# Win T-Bill User's Manual

**Version 1.0**

# User's Manual Note

This Manual has been prepared
to
provide instruction for our
Windows
Time and Material Billing
product.

# Overview of McCormick Time & Material Billing

**Wizard:**

The Wizard is used for the first time system setup.

**Offices:**

A user may set up a number of offices. A Company could use the different offices to separate divisions IE: Residential, Commercial, Industrial, etc. Another use would be if the main office were in New York City, with branch offices on Long Island and in Albany, Syracuse, and Newark, New Jersey. All the time and material billing could be done from the main office in New York City.

The office defaults (tax, markup, etc.) will be used each time an account is setup.

**Accounts:**

Accounts are the individual customers or jobs that each office services. The office defaults for tax, markup, etc. may be modified for each account.

**Work Orders:**

Work order forms may be created by adding Items manually, or by copying Items or Assemblies from the McCormick database. They can then be printed and used by the workers in the field.

**Invoices:**

Invoices may be created using the labor defaults created for that account. Material may be added by entering the Item or Assembly number, or inserting it from the list of Items or Assemblies in the database. When the list of items is used, "Find/Sort" and "Menu" may be used as in the estimating system. Additional Items such as Lifts, Rental Tools, of specials may also be added.

**Reports:**

A Customer Invoice and/or a Confidential report may be generated and printed based on Time and Material, Time and Material Not To Exceed, Quote, and Call Back.

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# Notes:

# Getting Started with the Win T-Bill

## Introduction

Welcome to the McCormick System Win T-Bill Program, designed by McCormick Systems especially for businesses like yours. The purpose of the software is to simplify the Time and Material Billing process helping you to control your billing and shorten Account Receivable time.

The software products of McCormick Systems are constantly improving. Many improvements start with the comments and suggestions from users like yourself. We value your comments and advice. If you have any creative suggestions or concerns, we want to hear from you. Just contact McCormick Systems using one of the methods listed in the Appendix under Technical Support.

## Using This Manual

This manual for the McCormick Win T-Bill software is arranged in three main sections:

**"Getting started with Win T-Bill"** – Installation tips for the hardware and software.

**"Users Manual"** – Detailed explanations of every Windows command, arranged in the order of the Billing flow. Program/Database Support and Billing Tools are also included.

"**Appendixes"** – Special sections for troubleshooting advice, technical assistance information, and a comprehensive index for this manual.

**Notes:**

# Before Installing your Software

While we at McCormick would like each user to read this manual cover-to-cover before billing a job, we recognize that most users don't have that kind of time. The best way to use the McCormick Win T-Bill software is to complete a Full Configuration, starting with establishing default settings for your company and working through the Set up Wizard step-by-step until you've created your first Office. Then create other Offices and Accounts as needed. We do provide a "Tutorial" to help with your first invoices.

# Protecting Your Investment

**Handling Media –** The weakest links in any computer system is the media you use to store data. You need to take good care of the media, and that means keep them away from liquids, heat, cold, static electricity, or magnetic equipment (including the speaker on the telephone).

**Backup Your Files –** The McCormick Win T-Bill software uses your hard drive to store active jobs. That can mean trouble if you have a problem with your hard drive. To avoid losing valuable data, make frequent backups of the jobs and databases you store on the hard drive. It's a good idea to backup and store a current copy off site. (See section "Backup and Restore Jobs" for more information on performing backups.)

**System Maintenance –** Repair and Compact should be run on a weekly basis or more or less often based on usage. It's also a good idea to use DOS/Windows utilities like ScanDisk and Defrag on a regular basis. See your DOS or Windows manual for more information on these utilities.

**Taking Care of Your Equipment** – One of the best investments in time you can make is the time it takes to take good care of your computer.

> **Surge Protector –** Buy a good surge protector. A voltage surge or spike can destroy all the data on your hard drive and even physically damage the drive. Try to buy a surge protector which also guards against voltage surges and EMI/RFI. If you have a modem, be sure it is surge protected as well. The phone lines can deliver spikes, which may damage your equipment.
>
> **Uninterruptible Power Supply (UPS)** – A surge protector guards your hard drive against power fluctuations but doesn't guard against problems when the power is interrupted. McCormick Systems strongly recommends that you have a UPS installed on your system. This will keep your computer running even if all power in your office is knocked out. UPS systems usually incorporate a surge protector so if you have to choose between one and the other, choose the UPS.

# Protecting Your Investment Continued

**Exit Software** – Make sure your computer is ready to be turned off by exiting all software and using the Windows Shut Down procedure.

**Dusting Off Your Monitor –** The screen of your monitor is a magnet for dust and fingerprints. If screen visibility is poor, dampen a cloth with water and wipe the screen clean. (Do not spray directly on the screen).

**Other Environmental Issues –** Before you set up your computer, think about where exactly to place it in your office. Check your computer manual to see what it suggests. Here are some environmental issues to think about.

**Ventilation –** Computers, display monitors, and printers all generate heat, so be sure your computer has adequate ventilation.

**Temperature** – Too much heat impairs your system's ability to function. The display monitor is usually the most susceptible to "hardware heat stroke." Most computer systems work well in a temperature range between 55 and 85 degrees Fahrenheit.

**Direct Sunlight** – Placing your computer in direct sunlight is not a good idea, it increases the temperature on your system and creates screen glare. If glare is an unavoidable problem, buy an anti-glare screen at your local computer store.

**Smoke and Dust** – Keeping your computer free from dust and smoke residue is another way of protecting your investment. Smoke and dust interfere with your systems cooling. For dusty environments, clean the vents of your system with a vacuum cleaner.

**Vibrations –** No vibrations are good vibrations as far as your computer is concerned. Set your computer on a stable, steady work surface out of the path of foot traffic. Make sure that all cables are secured and out of foot traffic areas.

**Static Electricity** – A sudden jolt of static electricity is enough to knock out your system and all your data. If you have trouble with static electricity in your office, ground yourself by touching the edge of your desk before you touch the computer. Anti-static floor mats are available for extreme cases. There is also anti-static rug spray to reduce static in particularly dry climates.

# Installation Instructions

**Follow the installation instructions that came with your McCormick T-Bill Software.**

**Notes:**

# Win T-Bill

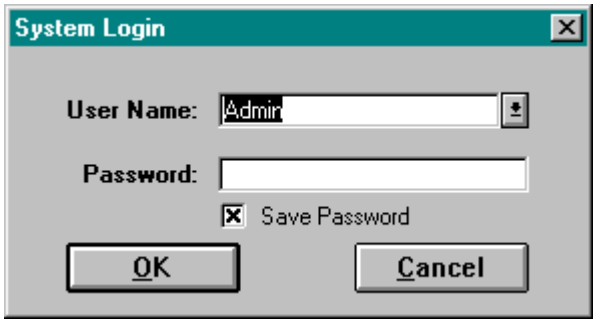
# Documentation

## Notes:

# Section I

# Time and Material Billing

# System Login




This is the First Dialog box you see when you enter the application. At this time you are required to enter an existing Users Name & Password to gain access to the program.

## User Name

First time users should Login as **"Admin"** as the password is the EXACT SAME AS THE USER NAME. This makes it easier to copy and insert in the password field. Either **"Est1 (800*600 monitor)"** or **"Est2 (640*480 monitor)"** can also be used, the password being just the "Est*" part of the user name. The remainder of the user name referring to the monitor configuration has no real bearing with today's monitors, the majority being SVGA, so it makes no difference which user you use.

> **Tip:** Some users will find that some areas described in this manual may not be completely available on your screen. We recommend running at 800x600 resolution or greater as this will give you more Screen Space. ***See your Windows manual for directions on changing Screen Resolution.

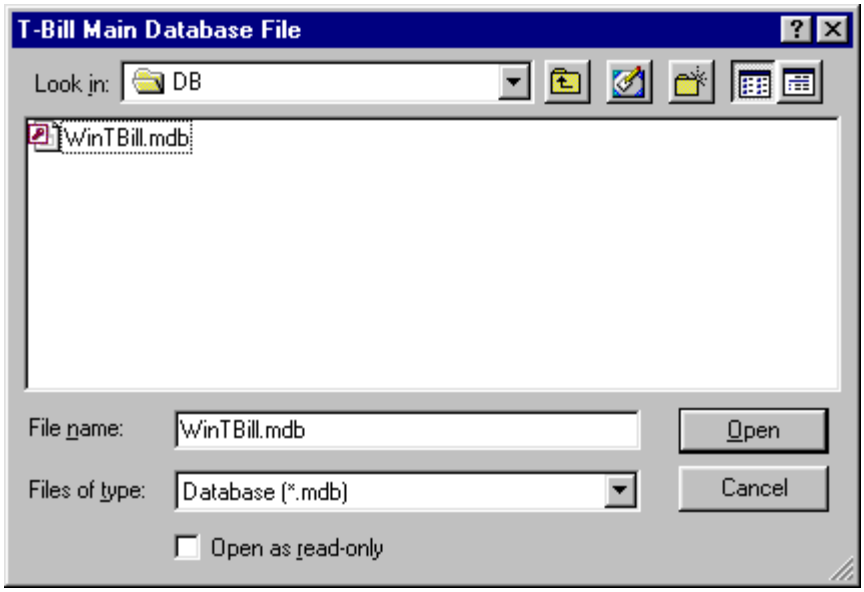
## Password

**The Login window also requires a password. For your first login, your password is the same as your user name (Admin, Est1 and Est2.) To change your password & set up a new User *See Security.**

> **Tip:** It's important to note that passwords are case-sensitive. For example, capital letters must always be entered as capitals in your password. Numbers are also allowed in the passwords.

> **Tip:** You have the option of choosing "Save Password". This will enable the user to skip this step the next time they log in.

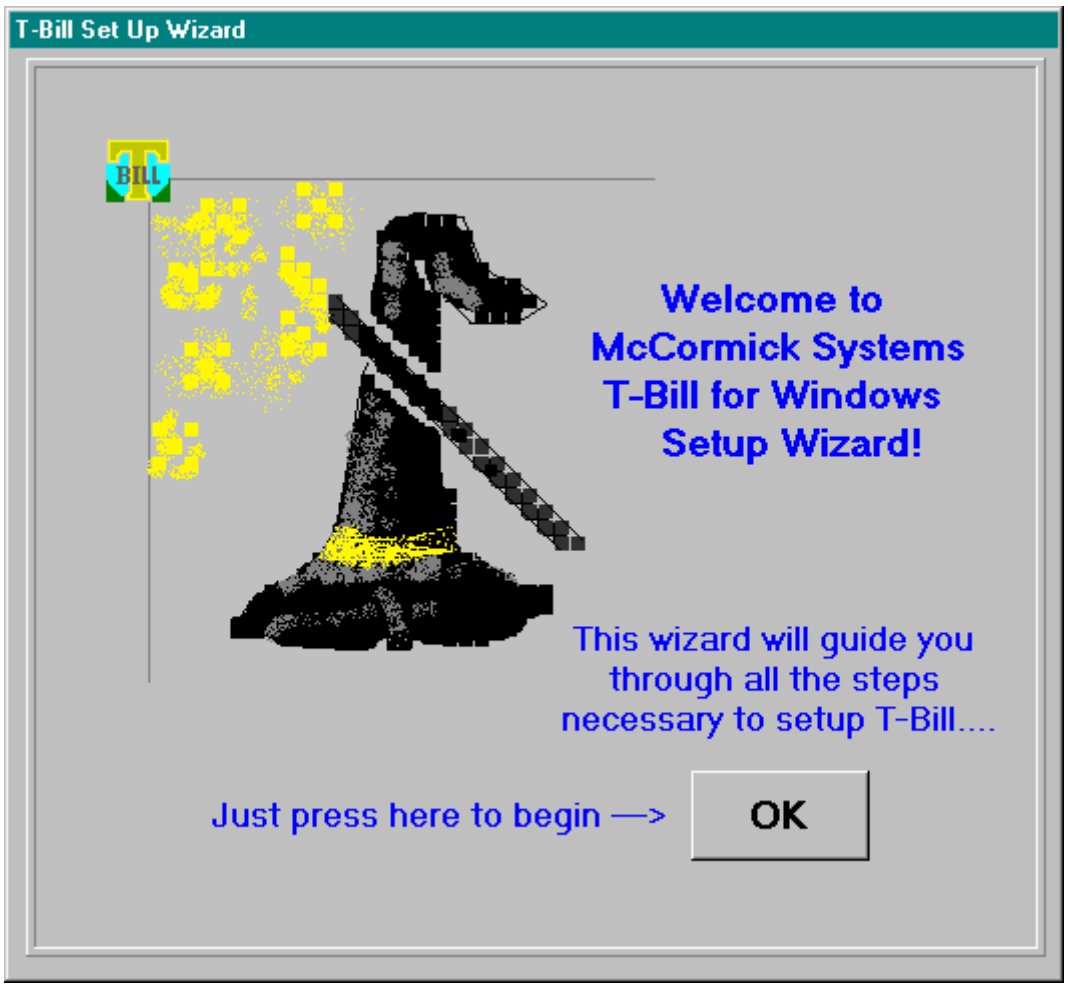
## T-Bill Database File




When doing the initial program setup, you will be prompted with the above window. You simply click on "Open" to select the default Win T-Bill database. This is a complete database that is used as an alternative to the estimating database. It is also the only database available to users using this program as a stand-alone application.

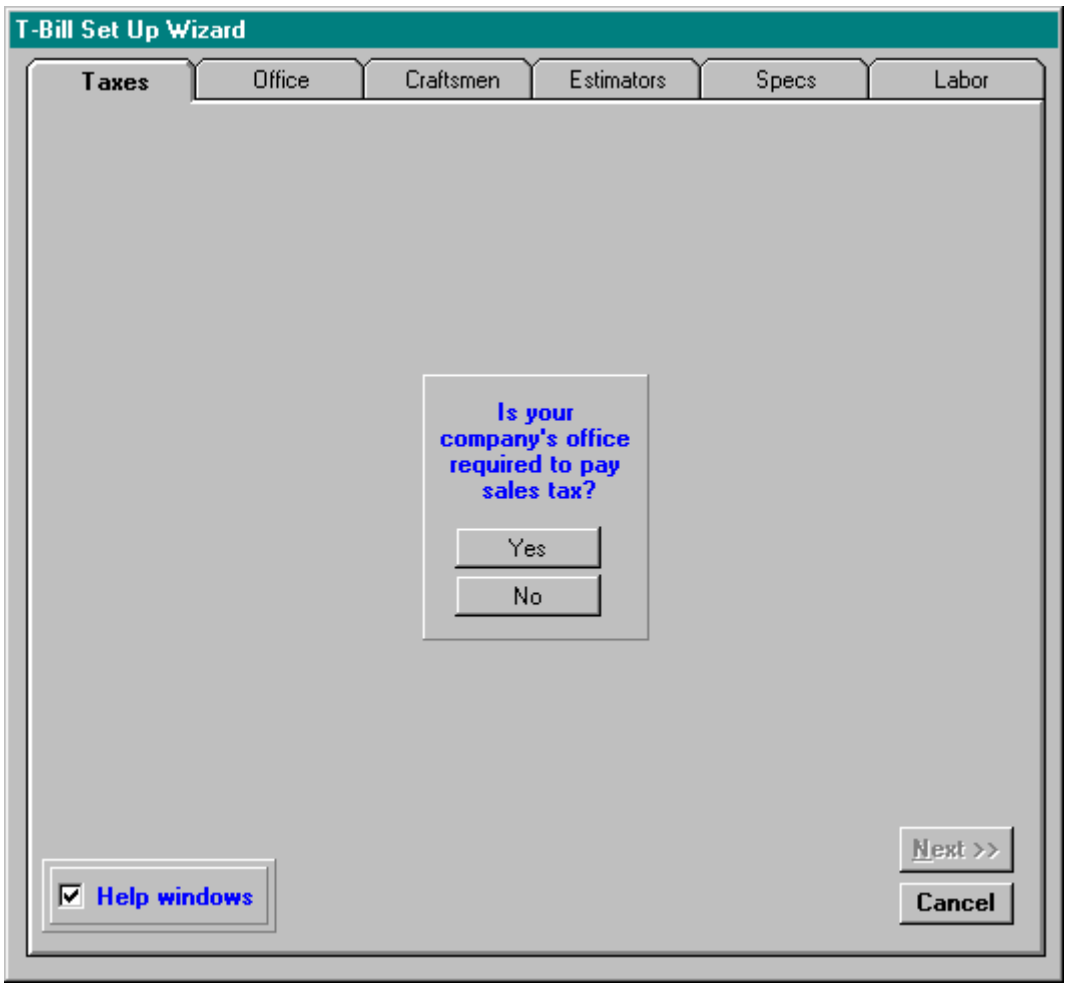
Accounts and invoices are automatically and constantly being written to this file while you are inputting data. Therefore, should you want to backup the program, simply copy this file onto a diskette or burn to a CD. The file location from a typical install is C:\Program Files\McCormick Systems\Win T-Bill\Db. Keep in mind, you can also "store" backups (on a monthly basis for example) at this location through your Windows Explorer.

# Wizard



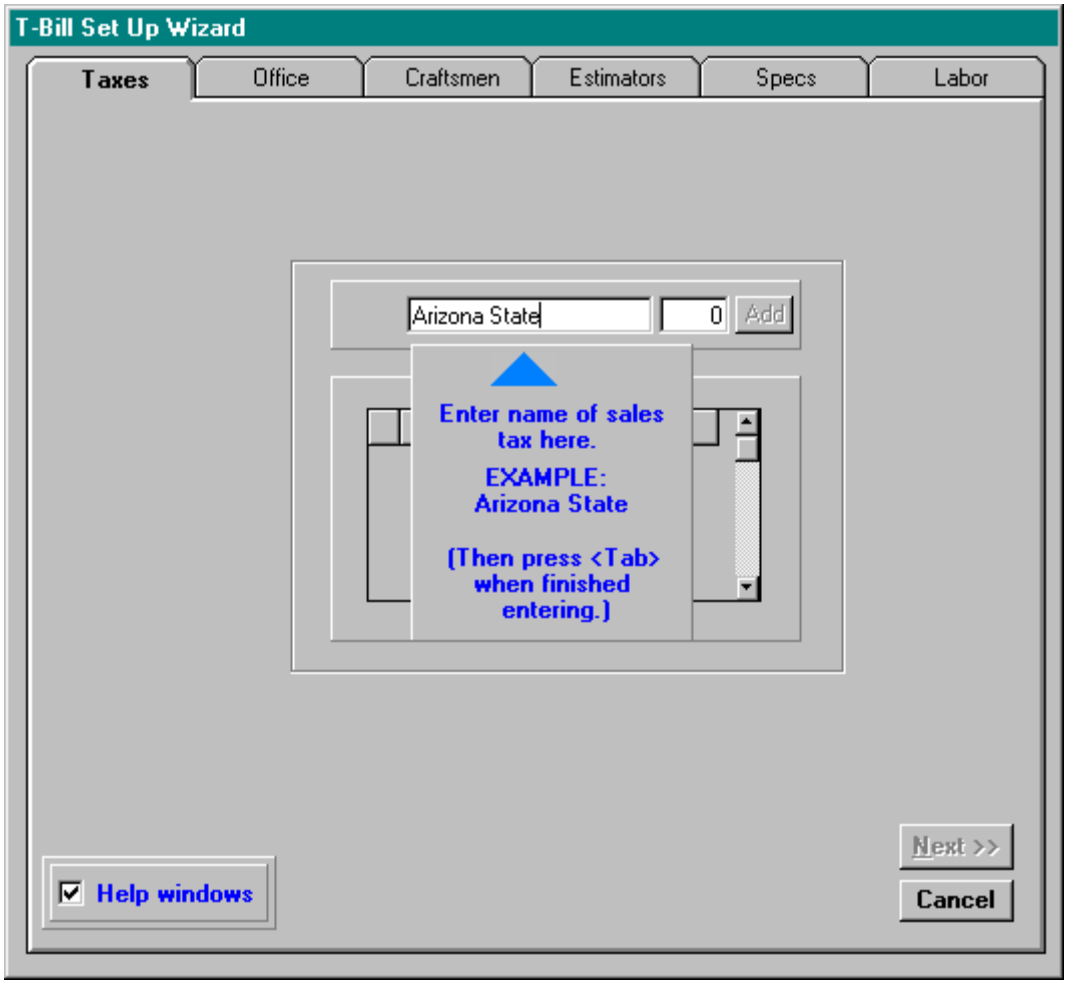

The first time login after initial installation will automatically activate the Setup Wizard. This will guide you through setting up an initial **Office** within the program. Click on the OK button to begin the process.

# Wizard (contd.)



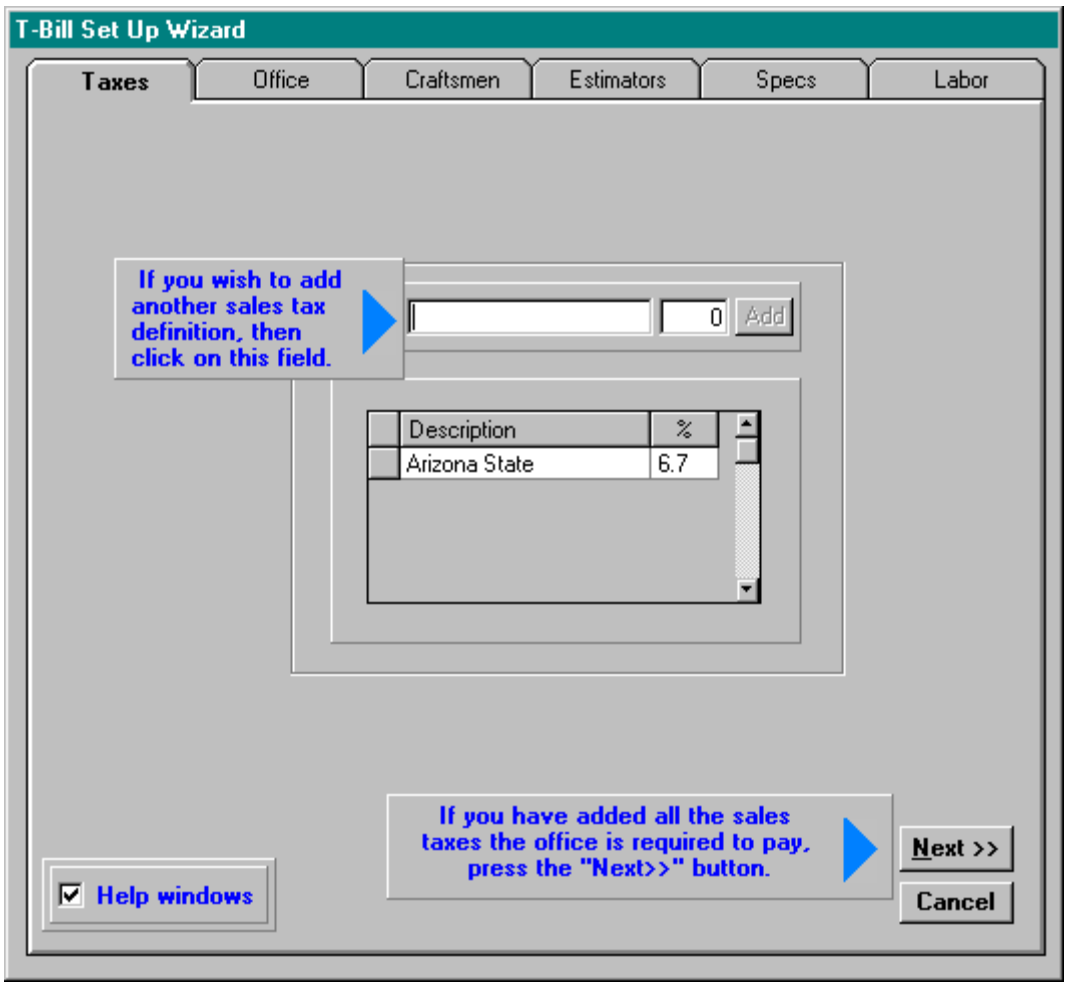

This window requires a "**Yes/No**" response to the question of taxes. It is a good idea to choose yes, even if you are currently not paying any taxes, since there may be a need to do so in the future. You will be able to select payment or non-payment on an individual account/invoice basis. Should you choose "**No**", you will not see the next window, but you will be able to adjust the situation later on within the actual program.

# Wizard (contd.)



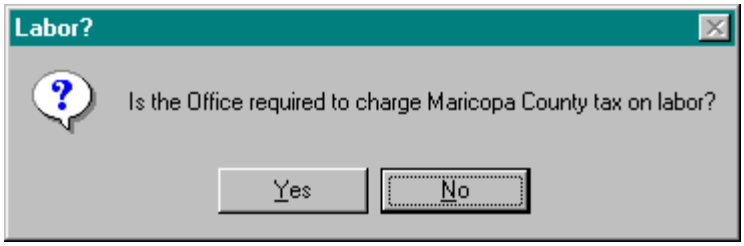

This window will setup your tax table for the program. As previously noted, even if you do not pay taxes currently, go ahead and setup the proper taxes for possible future use. Remember, if you had previously chosen "**No**", you would not see this window. Using <TAB> or <ENTER> will move you through the fields, including the "Add" button. When completed, select "**Next>>**".

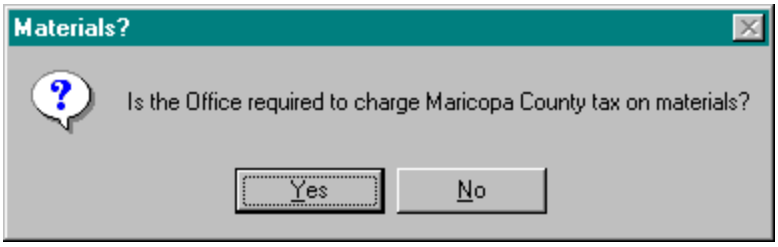
# Wizard (contd.)




Should you need to enter multiple taxes, the field will let you continue to do so until you have accounted for all taxes needed for any job you do anywhere.

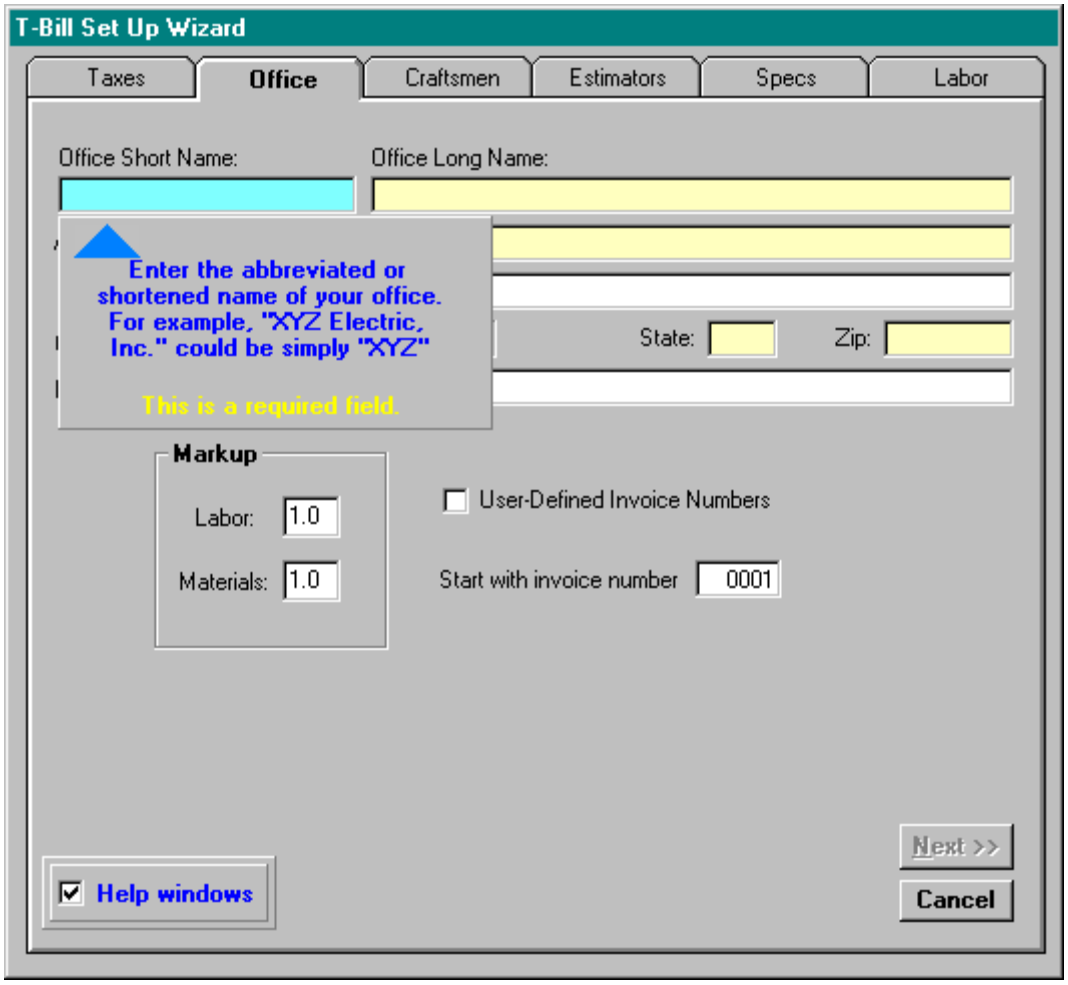
# Wizard (contd.)



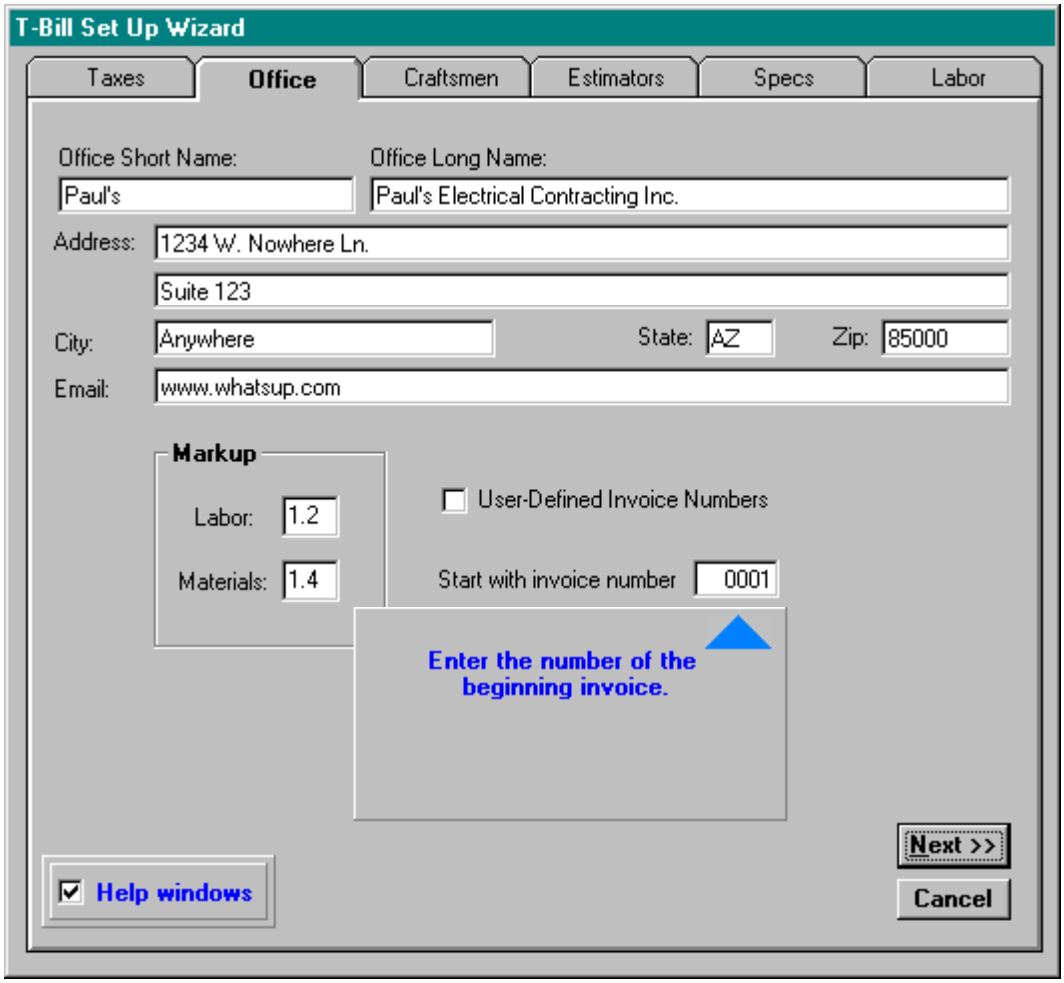

As you enter taxes, you will be prompted with the above windows for both taxes on labor and material. This will enter the taxes in their proper fields within the accounts and invoices.

# Wizard (contd.)




This window allows you to setup the initial office information. Again, <TAB> or <ENTER> will move you through the various fields. The fields "**Office Short Name**", "**Office Long Name**", "**Address**", "**City**", "**State**" and "**Zip**" are required fields and will be indicated as such on the prompt windows. Moving from the "**Email**" field to "**Markup**" has to be done using <ENTER>. Once completed, choose "**Next>>**".

# Wizard (contd.)




This is an example of a completed **Office** window. Remember, you can set the default **Markup** for the entire office from here. This will be your "baseline" markup and can be modified per account and/or invoice as well. The **Office Short Name** is used in the program wherever there is a list to be shown. It can be anything you want it to be. The **Office Long Name** should be your actual company name since it will appear like this on your invoices.

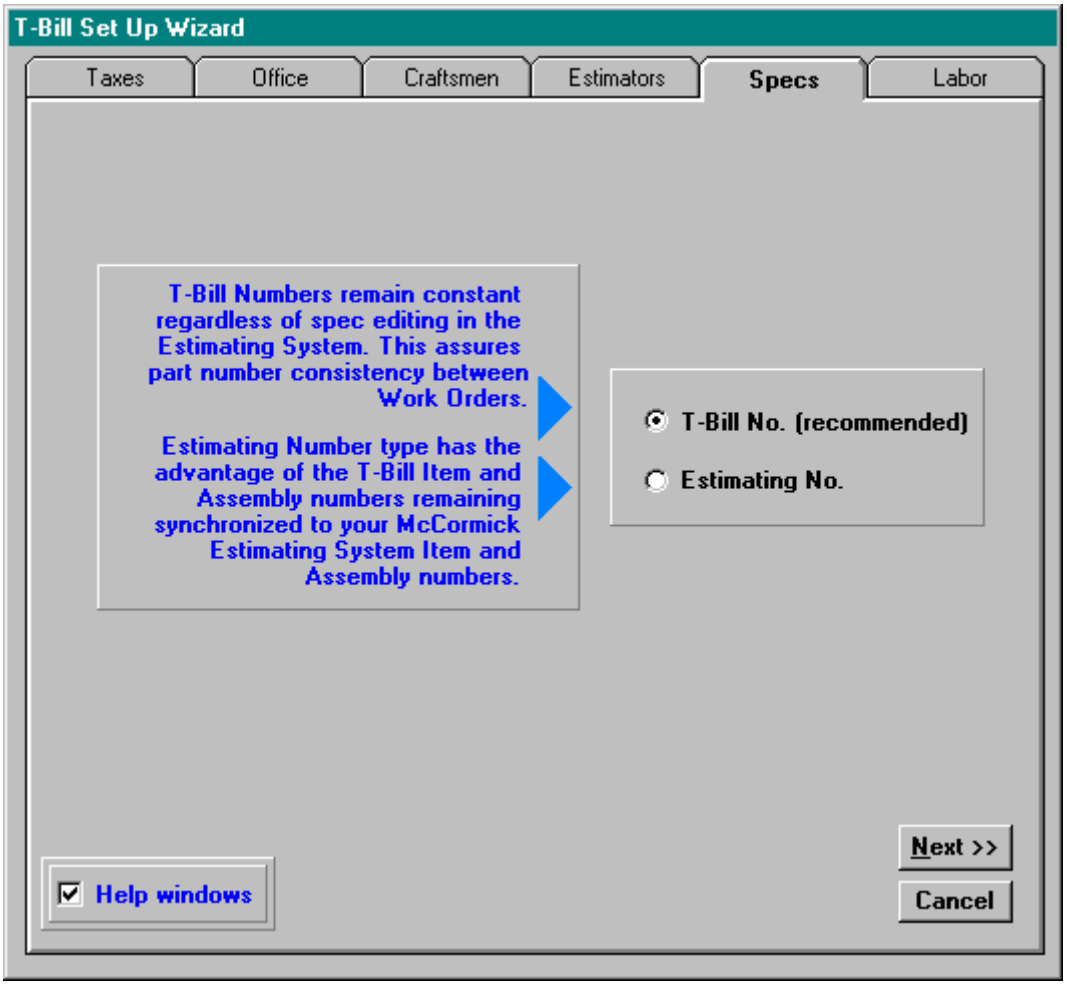
# Wizard (contd.)

This window sets up the **Craftsmen**. This list can include all your service people, but is really designed for a list of the "leads" that supervise jobs. It is recommended that full names be used as they will ultimately show up on the office confidential copy of the invoice. When completed, choose "**Next>>**".

# Wizard (contd.)

This window will list the Estimators. Typically this is a list of the individuals that enter the invoices, but could be used for the individuals that authorize the work or approve the final billing. Again, it is recommended that full names be used. When completed, choose "**Next>>"**

# Wizard (contd.)


T-Bill Set Up Wizard
Taxes
Office
Craftsmen
Estimators
Specs
Labor
T-Bill Numbers remain constant regardless of spec editing in the Estimating System. This assures part number consistency between Work Orders.
Estimating Number type has the advantage of the T-Bill Item and Assembly numbers remaining synchronized to your McCormick Estimating System Item and Assembly numbers.
T-Bill No. (recommended)
Estimating No.
Help windows
Next >>
Cancel

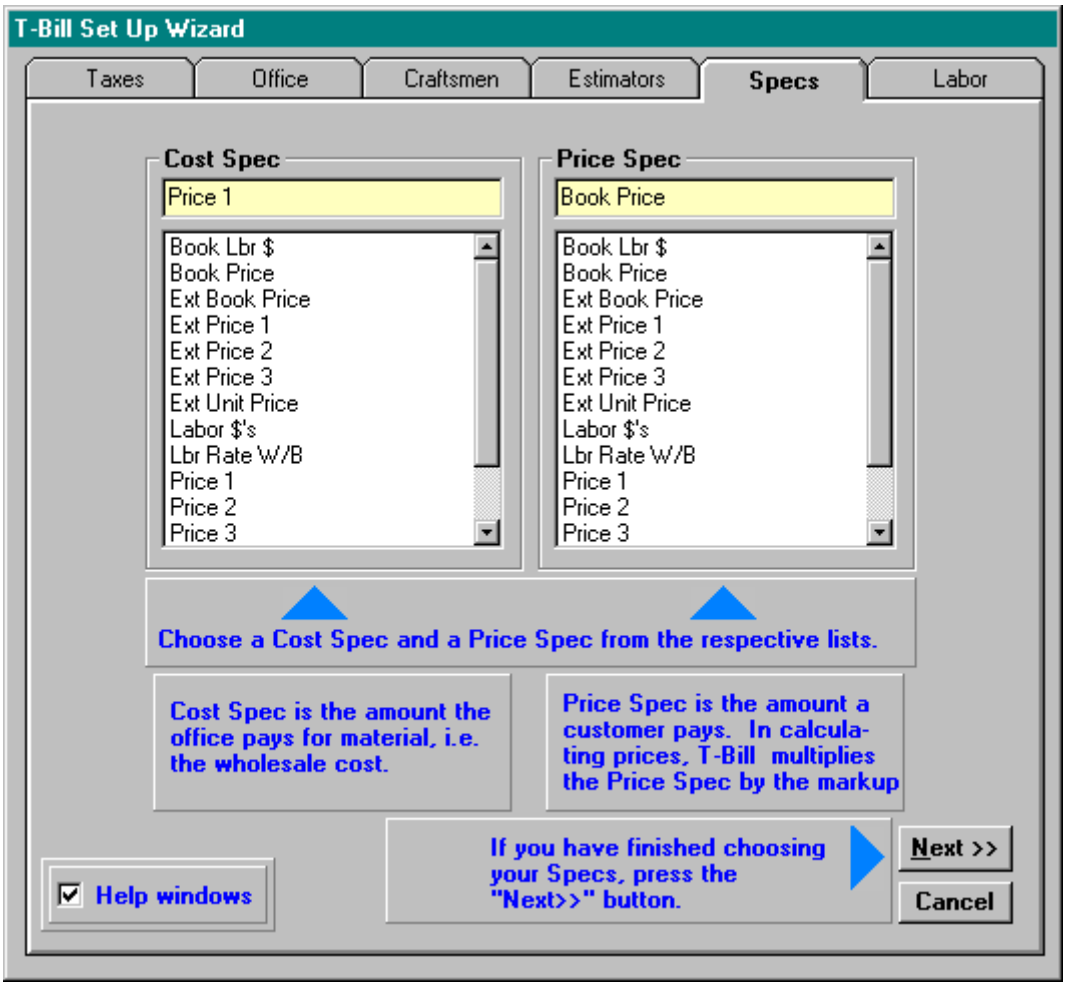
Okay, this window is where you choose which database you want to use for invoicing. Both databases can be keyed to your estimating database, but the second options is also synchronized, meaning that if you change the estimating database, you Win T-Bill database will also change.

Because the field personnel utilize work orders, it is recommended that the T-Bill No. database is used since it "locks in" the reference numbers, allowing the creations of standardized work orders and ease of invoicing.

Remember, if you are using this program standalone, there is a default Win T-Bill database that is already in place and preset. Of course, you will be able to edit it in a manner similar to the estimating program without being able to actually do estimating.

When completed, choose "**Next>>**"

# Wizard (contd.)

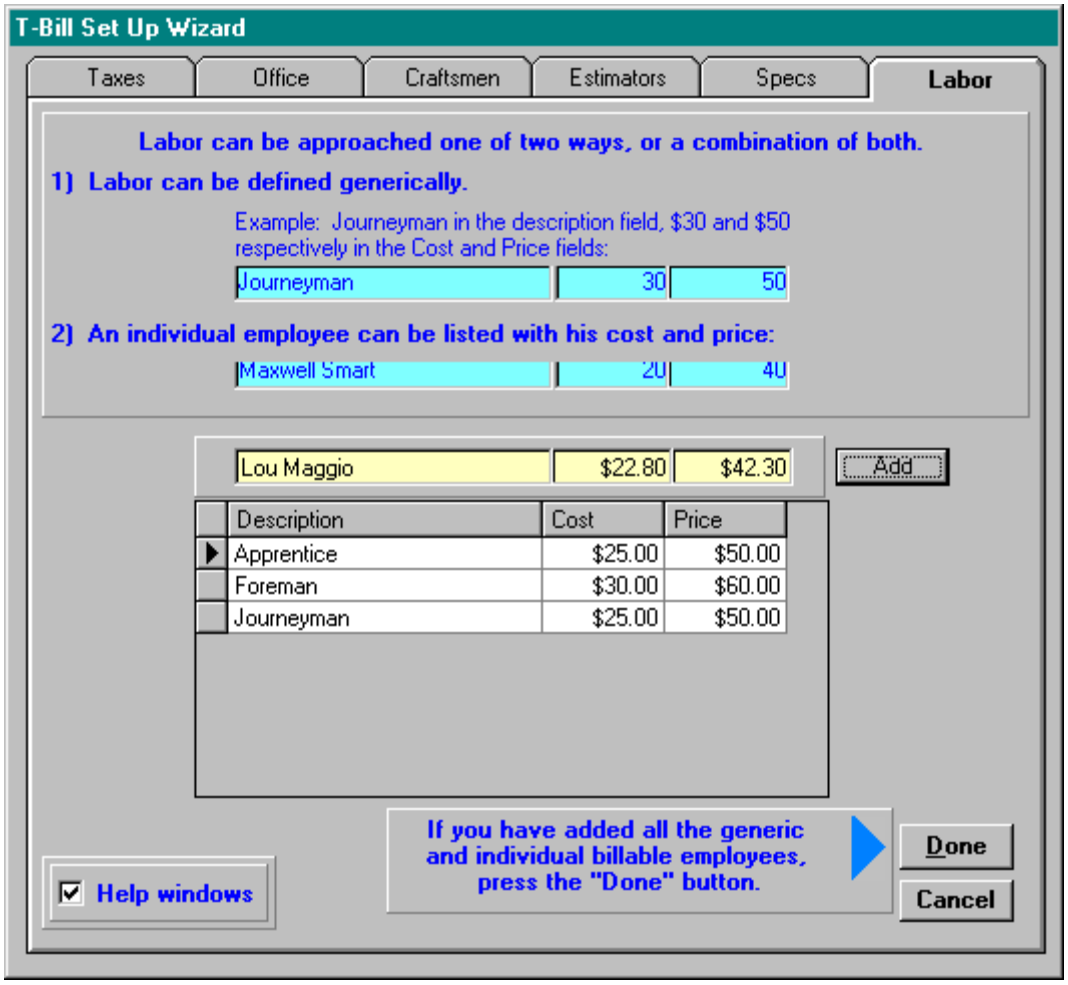



Now we get into a more detailed area. This window allows you to choose from the various pricing specifications contained in the database for your **Cost** and the customers' **Price**. Depending on the way you choose to setup your database and maintain pricing, there is usually a "built in" markup when you choose a different cost vs. price.

Keep in mind you have already chosen a markup for your office and you will have the opportunity to set markups both per account as well as individual invoice. These markups will be on whatever you choose for the Price Spec.

That means there are four areas for markup; *Database, Office, Account and Invoice*. When you have completed this window, choose "**Next>>**".

# Wizard (contd.)


T-Bill Set Up Wizard
Taxes
Office
Craftsmen
Estimators
Specs
Labor
Labor can be approached one of two ways, or a combination of both.
1) Labor can be defined generically.
Example: Journeyman in the description field, $30 and $50 respectively in the Cost and Price fields:
Journeyman 30 50
2) An individual employee can be listed with his cost and price:
Maxwell Smart 20 40
Lou Maggio $22.80 $42.30
Add
Description Cost Price
Apprentice $25.00 $50.00
Foreman $30.00 $60.00
Journeyman $25.00 $50.00
If you have added all the generic and individual billable employees, press the "Done" button.
Done
Cancel
Help windows

Use this window to set up your labor. As indicated, it can be done a number of different ways. For example, use generic categories as in the example, or list your individual electricians. You can also use a combination of the two.

Remember, you should be using a *total* **Cost** and **Price** that *includes* burden. Any markup will be applied to the Price.

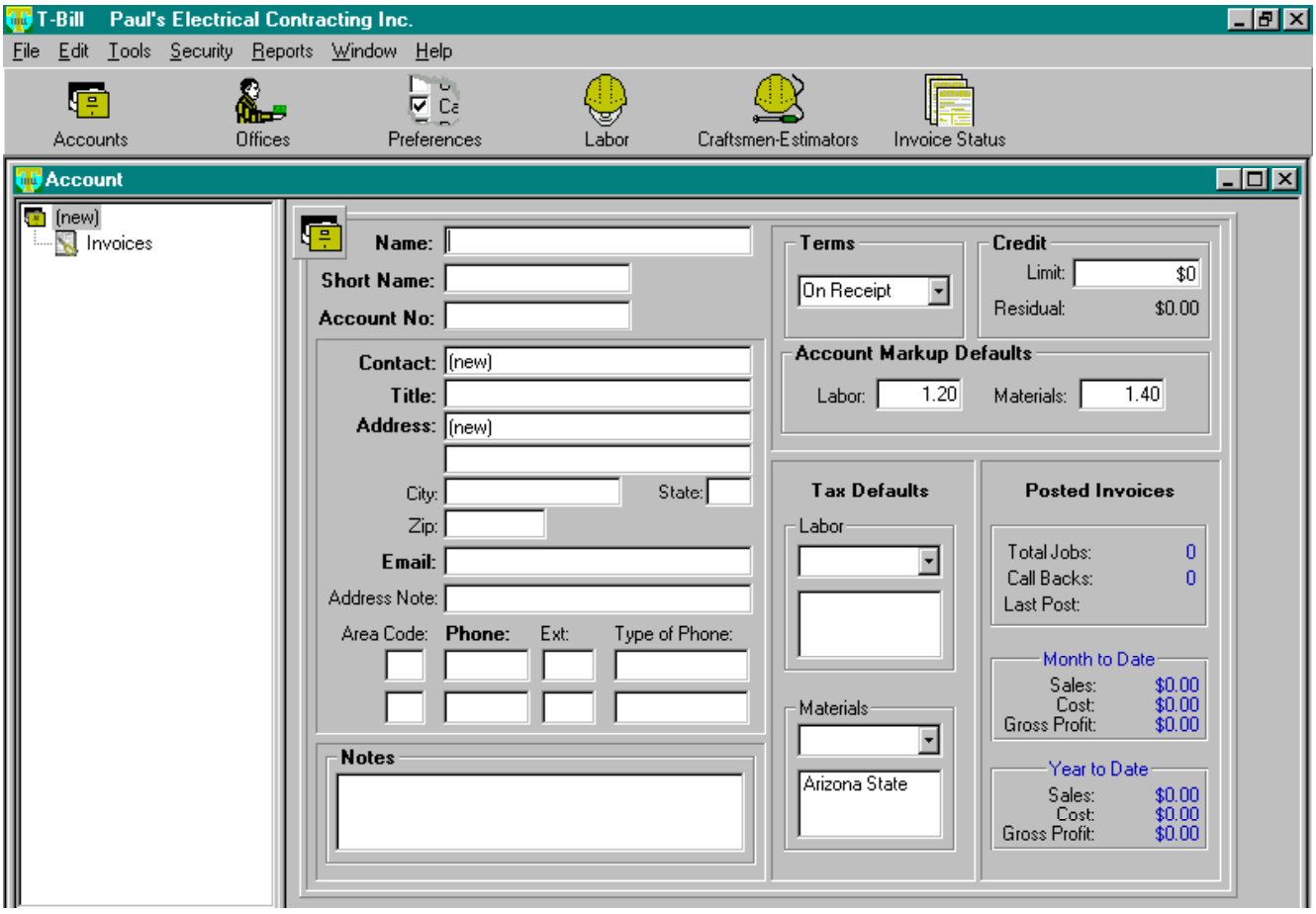
When you have completed this window (which is the last one), choose "**Done**"

# Wizard (contd.)

Exit Setup Wizard
BILL
Thank you for completing McCormick Systems T-Bill for Windows Setup Wizard.
Now that the wizard is complete, would you like to go into T-Bill for Windows?
Yes
No

Congratulations, you have finished creating your initial office settings for the program. You may now choose either "**Yes**" or "**No**" to actually go into the program. The Setup Wizard will not show up again unless you do another complete install. Any further or future changes to your settings will have to be accomplished within the program.

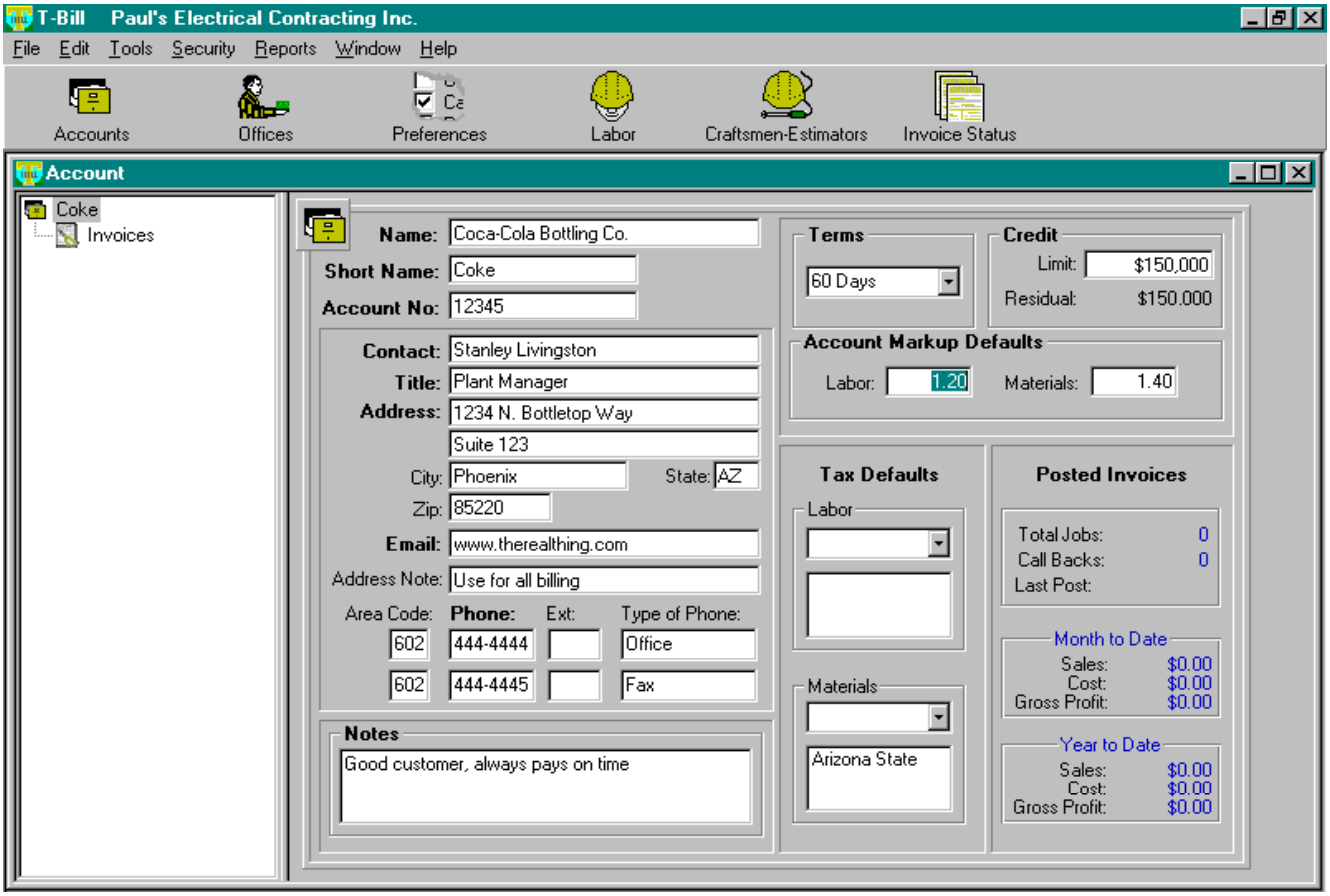
# Accounts




When you first go into the program after completing the Setup Wizard, you will see the above window. Note the title bar across the very top of the screen will indicate the **Office** you are working in. You will have a line of "pulldown" options typical for any Windows program and a collection of icons below that. These icons will be covered in a later section, but they perform functions within the program.

As you can see, you are in a brand new account. You must provide the necessary data for this account, starting with the **Name**. This should be complete as it will appear on the customer's invoice. Again, the **Short Name** is to make it easier to identify this account in a list (as on the left side of the window). You will notice that the **Account Markup Defaults** are those you initially chose in the Setup Wizard for this Office.

# Accounts (contd.)



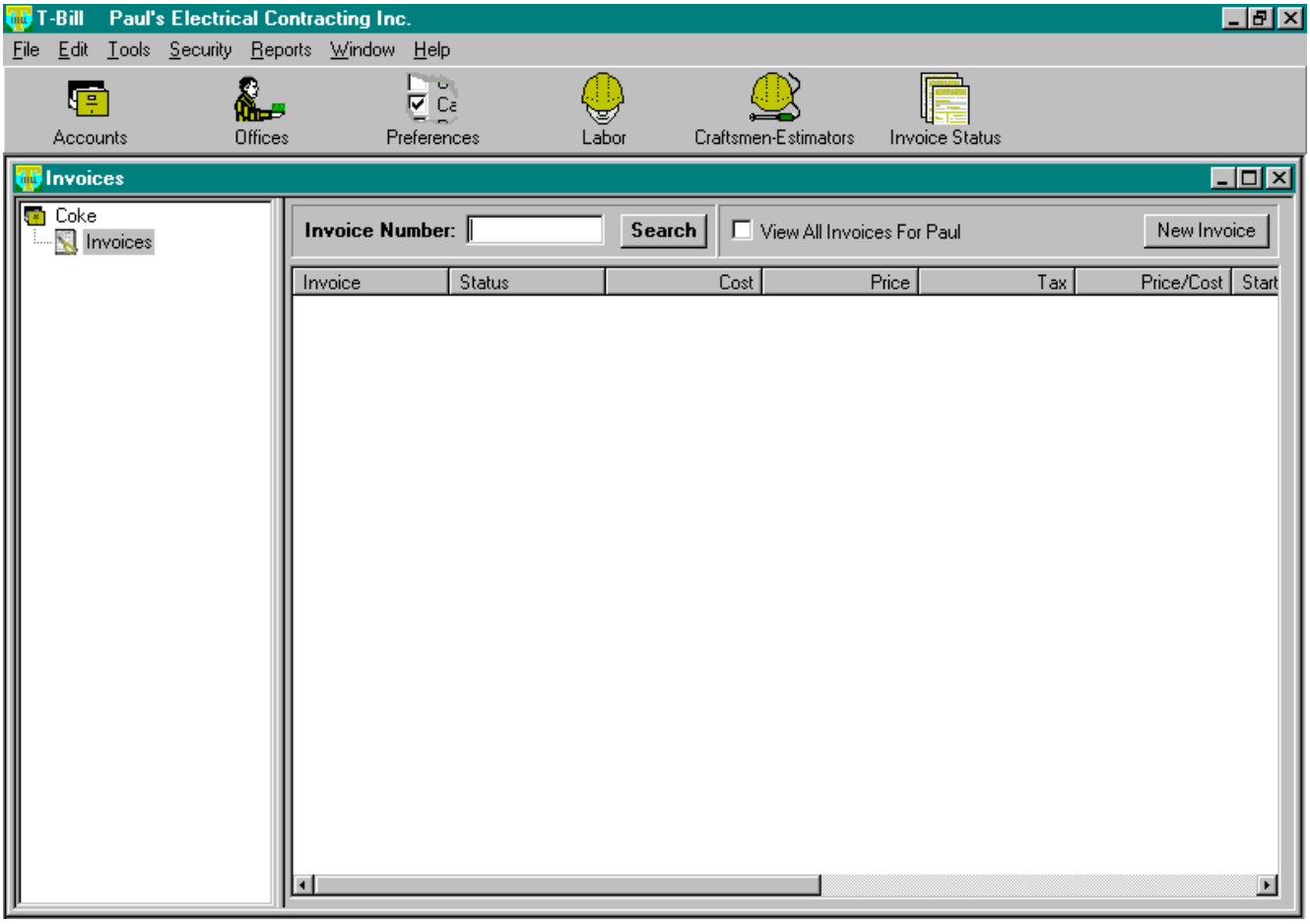

Let's look at a completed account and what the different fields represent.

- **Tree** – Upper left corner of window. This is the list of **Accounts** you have created. As you highlight each account it will bring up either **Invoices** or any existing **Sub-Accounts** that may apply to this account.
- **Name** – This is the full customer name that will appear on the invoice.
- **Short Name** – This is the name used within the program to save space.
- **Account No.** – This is the account number you assign (be careful, at this time there is no way to prevent duplicate account numbers).
- **Contact** – The name of the individual coordinating the account on the customer's end.
- **Title** – The official title of the **Contact**.
- **Address** – The *billing* street address (second line can be a suite, "Accounts Payable", etc.).
- **City/State/Zip** – Self-explanatory but necessary for the billing address.
- **E Mail** – Optional field that lets you enter the customer's e-mail address.
- **Address Notes** – Any special notes that apply to the address.

# Accounts (contd.)

- **Phone Information** – Enter the appropriate information.
- **Notes** – General information about the account, the customer, etc.
- **Terms** – Choose whatever terms apply to this account.
- **Credit Limit** – Set the credit limit for this account. Also indicates the Residual, so as you generate invoices, you will see at a glance what is remaining of the customer's credit limit.
- **Account Markup Defaults** – Initially they will be the same as the ones setup for the office, but you can modify them here for this particular account. The modified markups will carry over to the invoices.
- **Tax Defaults** – Will reflect the taxes you created/assigned in Setup Wizard. You will be able to choose applicable taxes from the pulldowns for this account *if they are available for this office*. If you need to modify your tax table, it will be done via the Preferences icon, covered later in this documentation.
- **Posted Invoices** – As you post invoices, this area of the account will keep a "ledger" of what has been posted. Note it has both monthly and yearly totals.

# Invoices

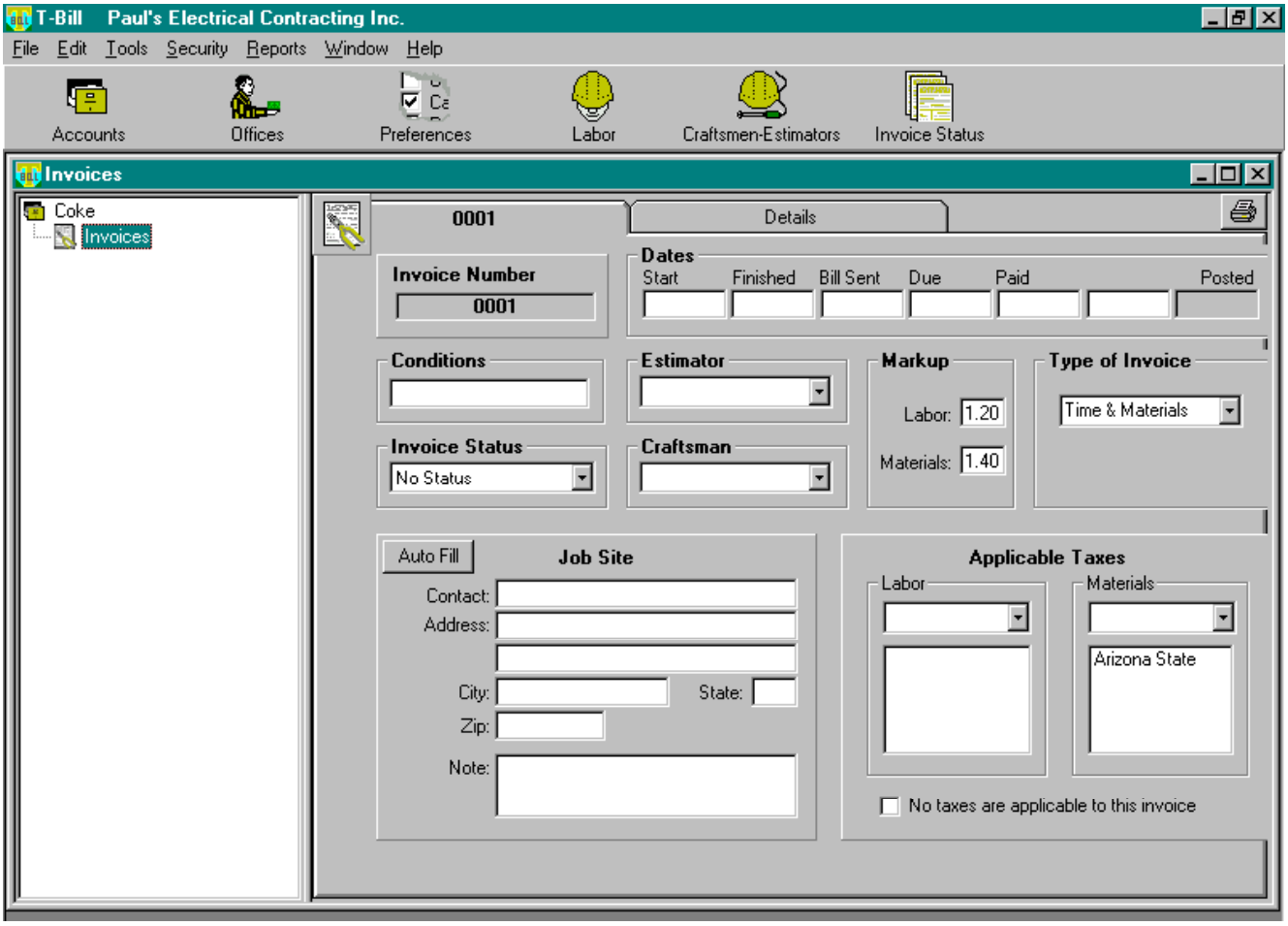



When you select Invoices from the account tree, you will see the above window listing all the invoices for this account (this example is brand new). It will indicate all the pertinent data for each invoice as a line for easy review including its current status.

If you want to start a new invoice, either do a right click on Invoice in the tree and click on "**Add Invoice**", or click on the "**New Invoice**" button in the upper right corner.

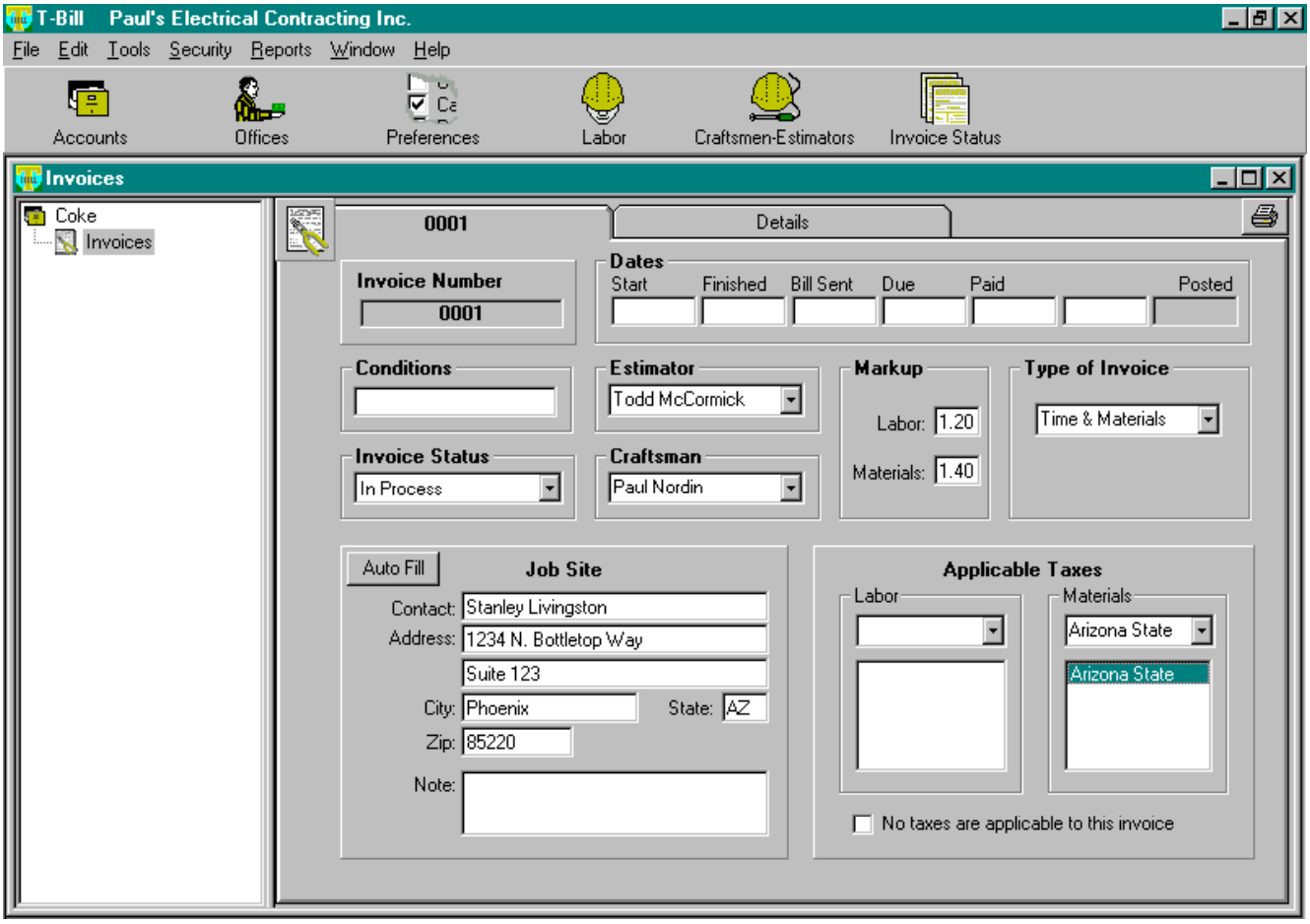
If you are here to open an existing invoice, simply do a double click on the invoice you want and it will open up.

# Invoices (contd.)




The above window is the initial invoice window. Note there are no Dates, Estimator, Craftsman or Job Site information. You will provide this information. Also note there *is* an Invoice Status, Markups and Type of Invoice. You can and will change this information as needed.

# Invoices (contd.)



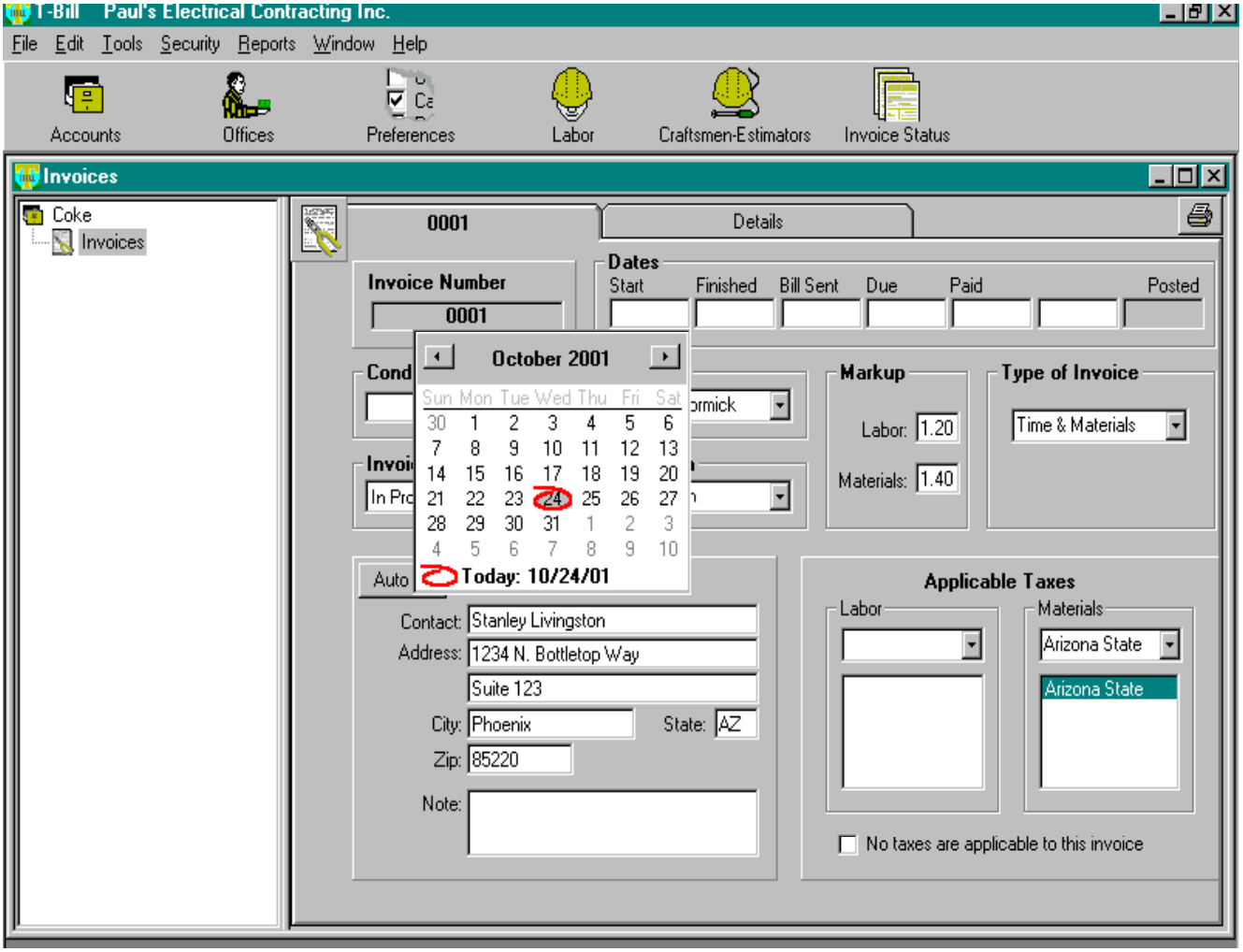

The different fields and definitions are as follows:

- **Conditions** – Is a User Definable field and is accessed through the Preferences icon. It can be whatever you want it to be (Conditions is only an example).
- **Invoice Status** – This will reflect the current status of the invoice. Select the appropriate choice from the pulldown.
- **Estimator** – This is the individual from the list you previously set-up via Wizard of those who prepare or are authorized to approve invoices. Select from the pulldown.
- **Craftsman** – This is the individual from the list you previously set-up via Wizard of leadmen that did or are doing the work for this invoice. Select from the pulldown.
- **Markups** – These fields "carry over" the markups previously established for the account. Your invoicing will reflect these markups as you input the data. They can be changed anytime during the invoicing process to reflect special circumstances and/or changes in labor and material. ***You should review these markups anytime prior to input to make sure they are correct***. To change, simply highlight and type.

# Invoices (contd.)

- **Type of Invoice** – This field allows one of four choices; Time & Material, Not To Exceed, Quote, and Call Back. Select from the pulldown.
- **Job Site** – This is the information for where the work is actually being done. If different from the Account, it must be input manually. If it is the same location as the Account, simply choose the **Auto Fill** button and the information will automatically be transferred.
- **Applicable Taxes** – These fields contain the taxes previously set-up in Wizard. By default the list will include *all* available taxes. If you decide not to use a *specific* tax, double click on it in the list and you will be prompted whether you want to delete it or not (this is invoice specific and can be reversed). If the *entire invoice* is not-taxable, you have the option of choosing the **No taxes are applicable to this invoice** box and it will disable any taxes (this can be turned on and off during the input process to tax or not tax your input).

# Invoices (contd.)

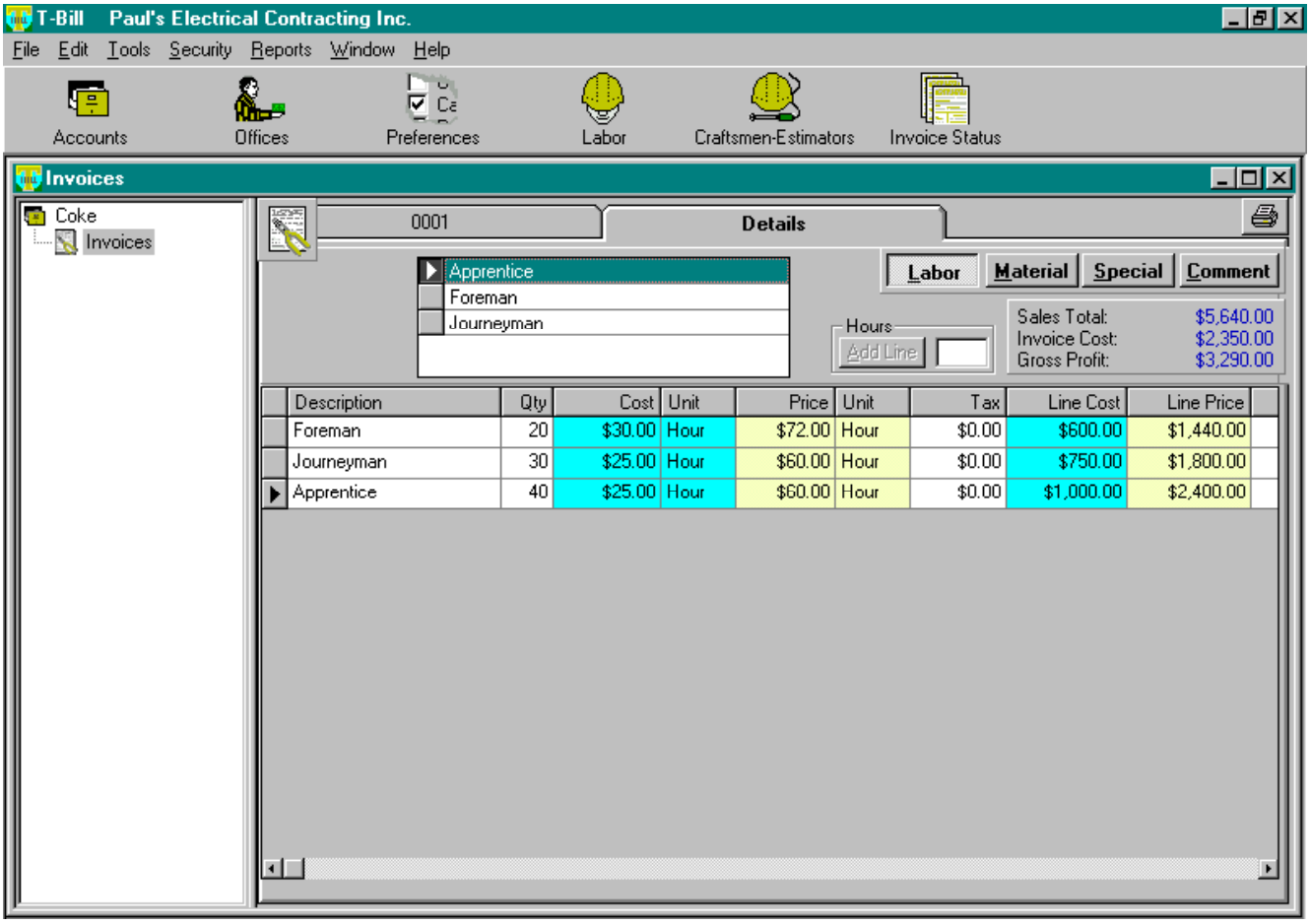



Inputting dates is accomplished by clicking in the desired field (**Start, Finished**) and getting the calendar as shown above. Today's date is highlighted and circled in red. Click on the date you want, remembering that the Start date can be previous to today's date as the start of the actual work you're invoicing *OR* can even be a future date for planned work to be invoiced. Finished can also be used when the invoice is completed *OR* a future date for when the work must be done.

The **Bill Sent** date will be filled in automatically when you review the invoice, or can be input manually when the bill is actually sent. If the date doesn't match, the program will ask if that is the date you want to use. The **Due** date will fill in automatically from the Bill Sent date, based on the **Terms** of the Account.

The **Paid** date will have to filled in manually when payment is received and you are notified by the accounting department (unless you wear both hats!).

# Invoices (contd.)



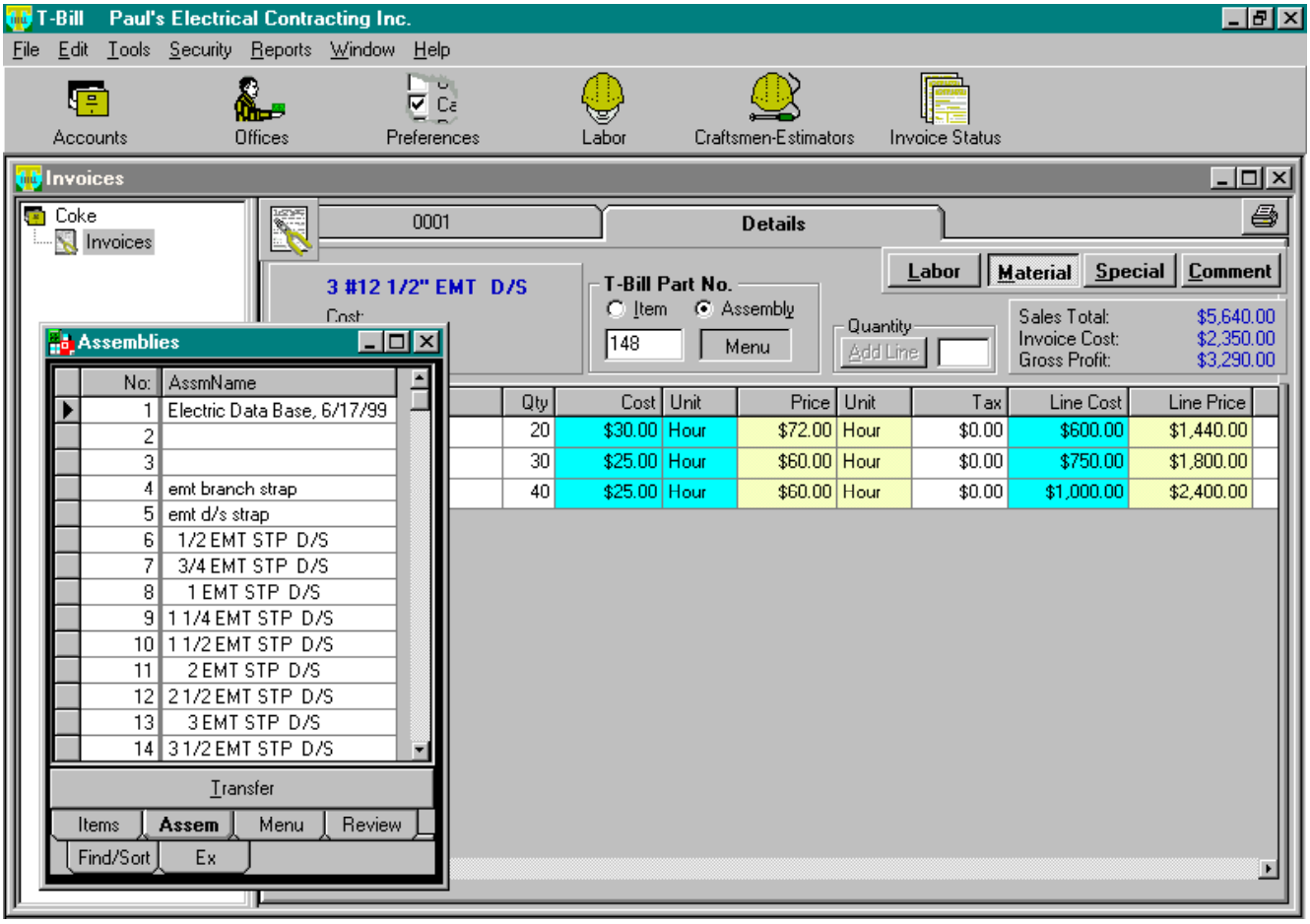

Once the "cover sheet" for the invoice is completed, proceed to the next area of invoice, data input. This is accomplished by clicking on the companion tab at the top of the invoice labeled **Details**. There are four (4) areas of data input; **Labor, Material, Special, Comment**.

The first area, Labor, will be brought up automatically. Input is accomplished by selecting the correct labor category from the list, i.e., Foreman, Journeyman or Apprentice.

> **NOTE:** When not active, the background will appear yellow. When a category is selected, it will appear white and the **Hour** field will be active with a cursor.

Type in the total number of hours that apply for this category, then either click on the **Add Line** button or simply hit **Enter**. It will then appear in the invoice area. Check the results.

# Invoices (contd.)

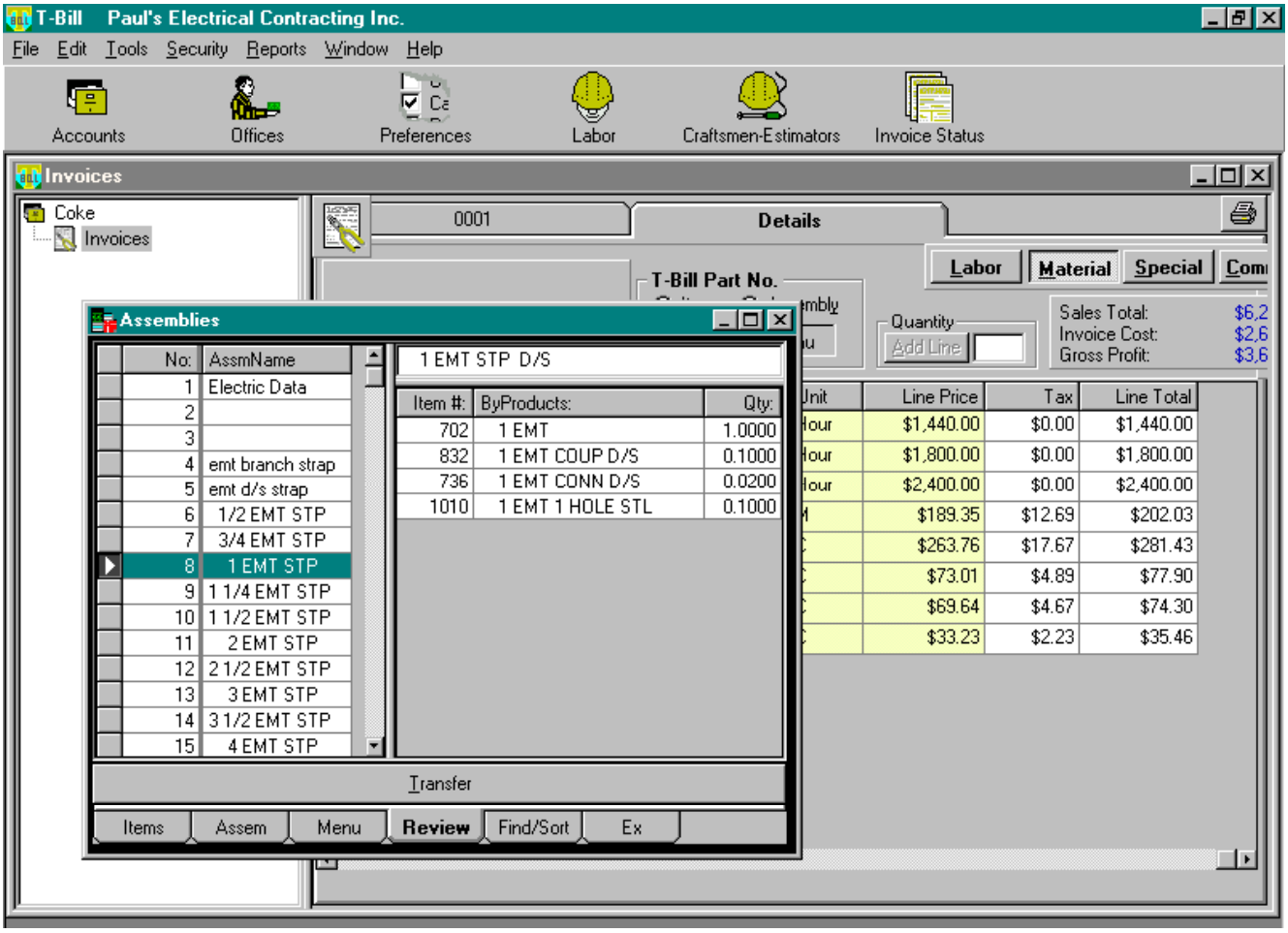



Once you have completed Labor (you can go back anytime), the next area of input is **Material**. Click on the button and you will see the above window. It will automatically bring up a *database window* for **Item** or **Assembly**. The database window will be determined by the database you chose during the Set-up Wizard.

The first column in the window is the reference number, which should match the Work Order (covered later) number used in the field by the leadman. The second column is the Item/Assembly Name, which should also match the Work Order.

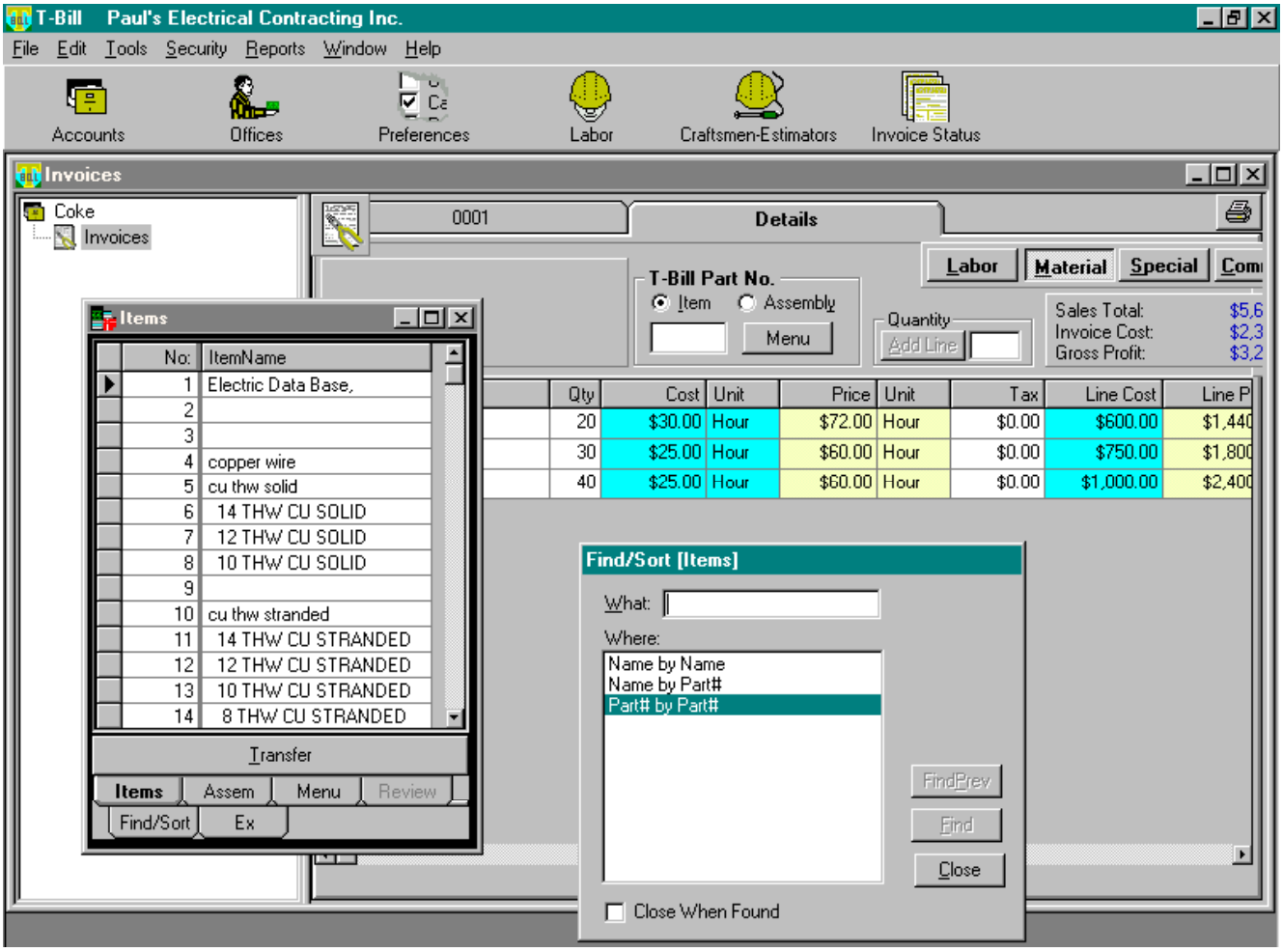
At the bottom of the window are the tabs for manipulating this particular window. The Item/Assembly tabs will toggle back and forth between the two different databases.

# Invoices (contd.)



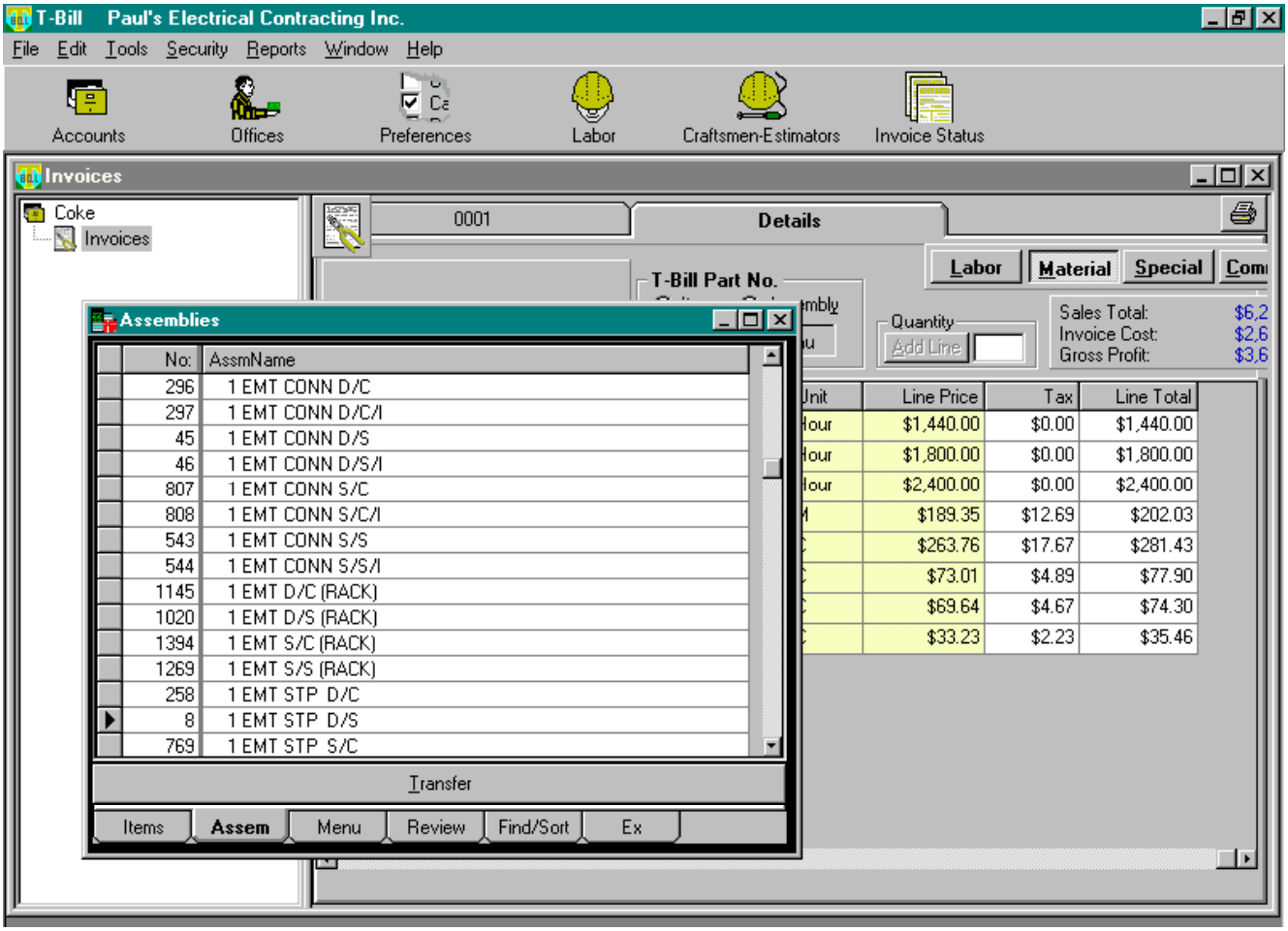

If you are using Assemblies for invoicing, you can use the Review tab to see what individual items make up that particular Assembly. The information includes the Item #, the ByProducts (same as the Item name), and the Qty of those ByProducts for a SINGLE Assembly. Typically, our Assemblies are put together as either one each or one foot, leaving it up to you to provide the count or length.

# Invoices (contd.)



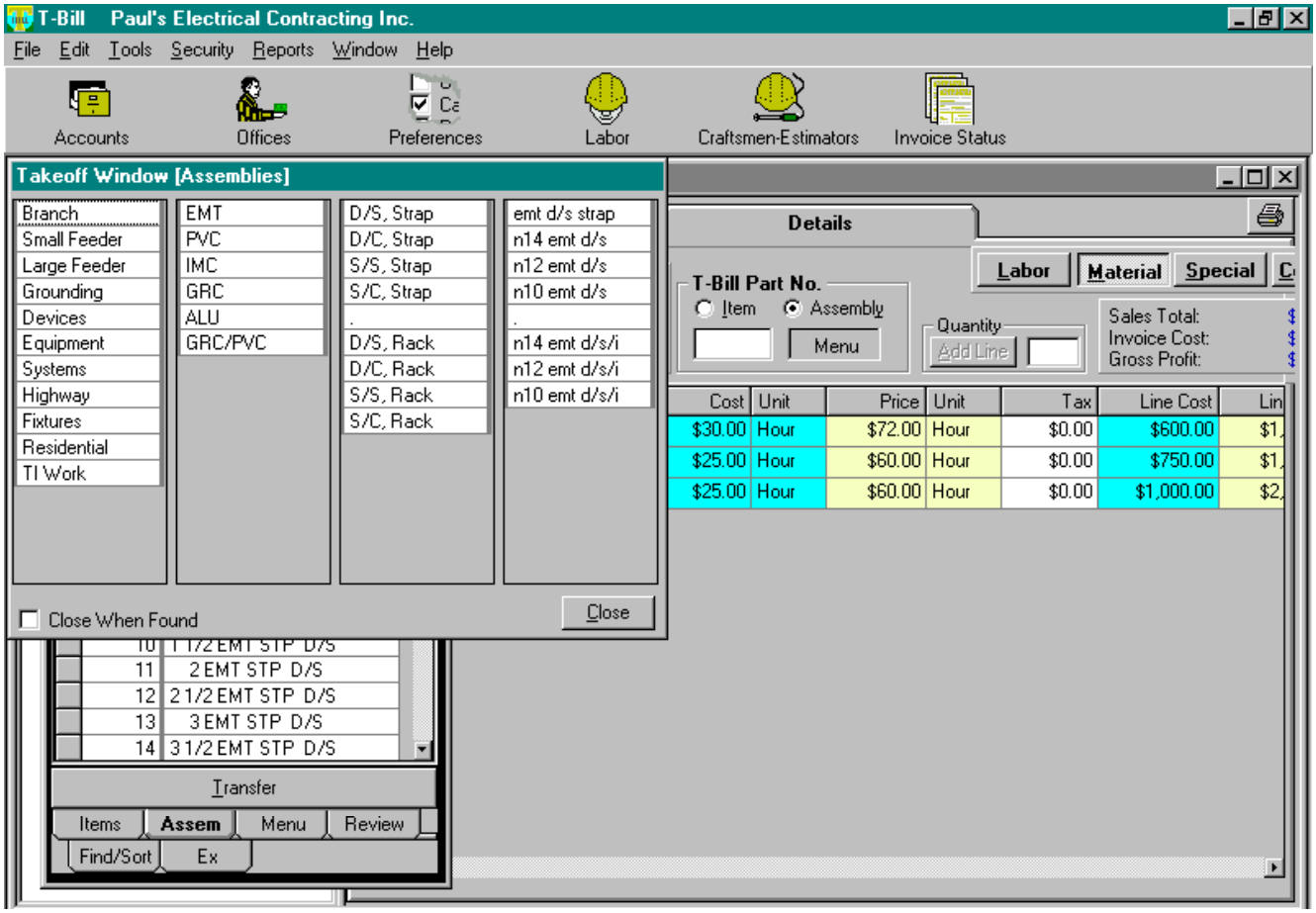

The first method for locating information in the database is **Find/Sort**. This feature will allow you to simply type in the reference number from the Work Order and go directly to the corresponding number in the database. You then click on the **Transfer** button.

# Invoices (contd.)




A method very closely related to using Find/Sort is **Exchange**. When you have located either a header (the section descriptions) or a specific Item or Assembly, click on **EX** and it will sort the entire database. This can greatly simplify finding similar data without knowing specific reference numbers.

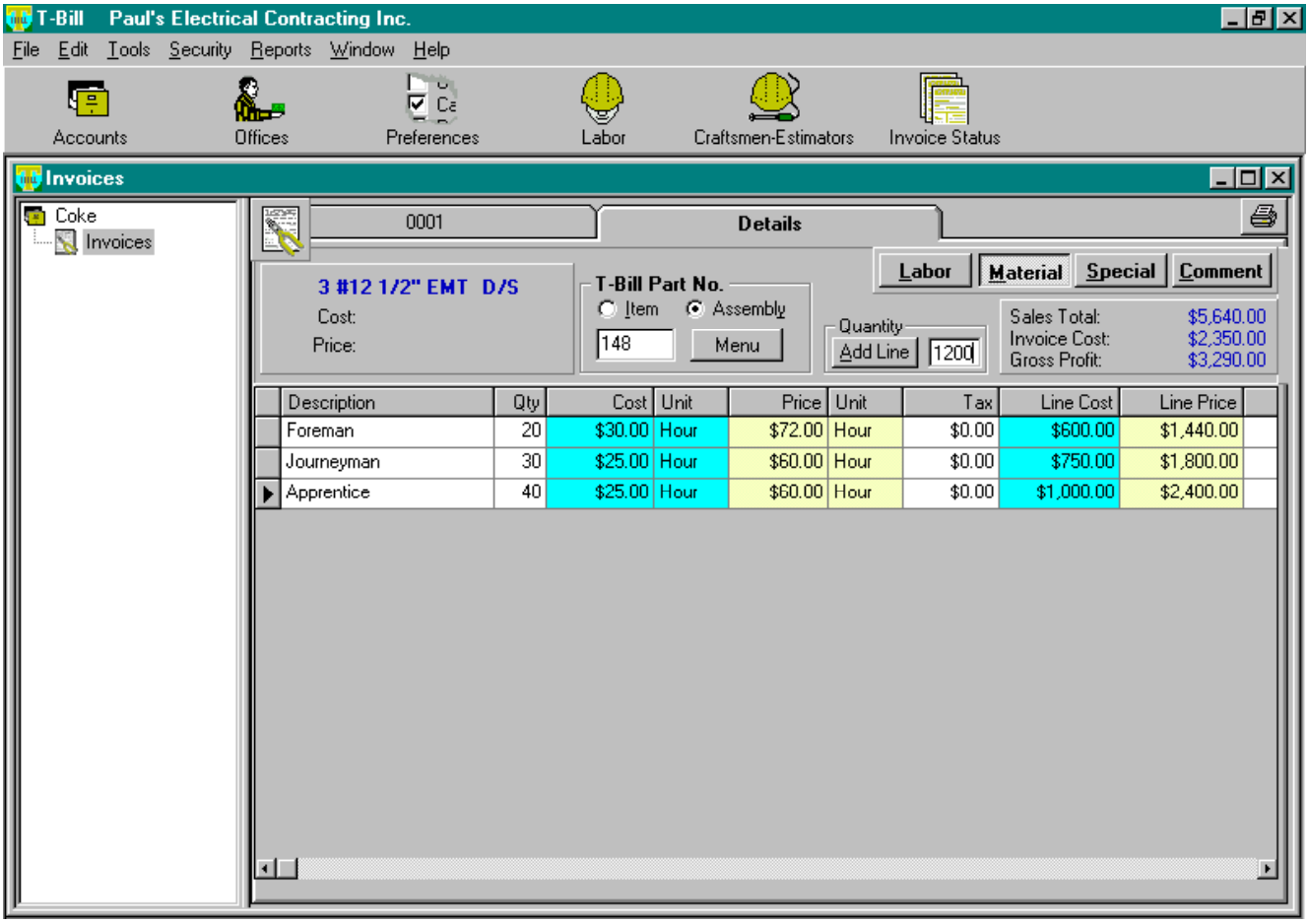
# Invoices (contd.)




Another method of locating the database information is the use of the **Menu**. In it's simplest form, you would work the columns left to right, choosing what areas indicate what you are looking for. When you make your selection in the last column (which could be columns 2, 3, or 4), you will be "sent" to that location in the database. You then scroll to the exact information, click on it to focus there, then click on **Transfer**.

> **Tip:** To keep your workspace somewhat less cluttered, check the **Close When Found** box in the lower left corner. Once the match is made to the database, the Menu will close automatically.

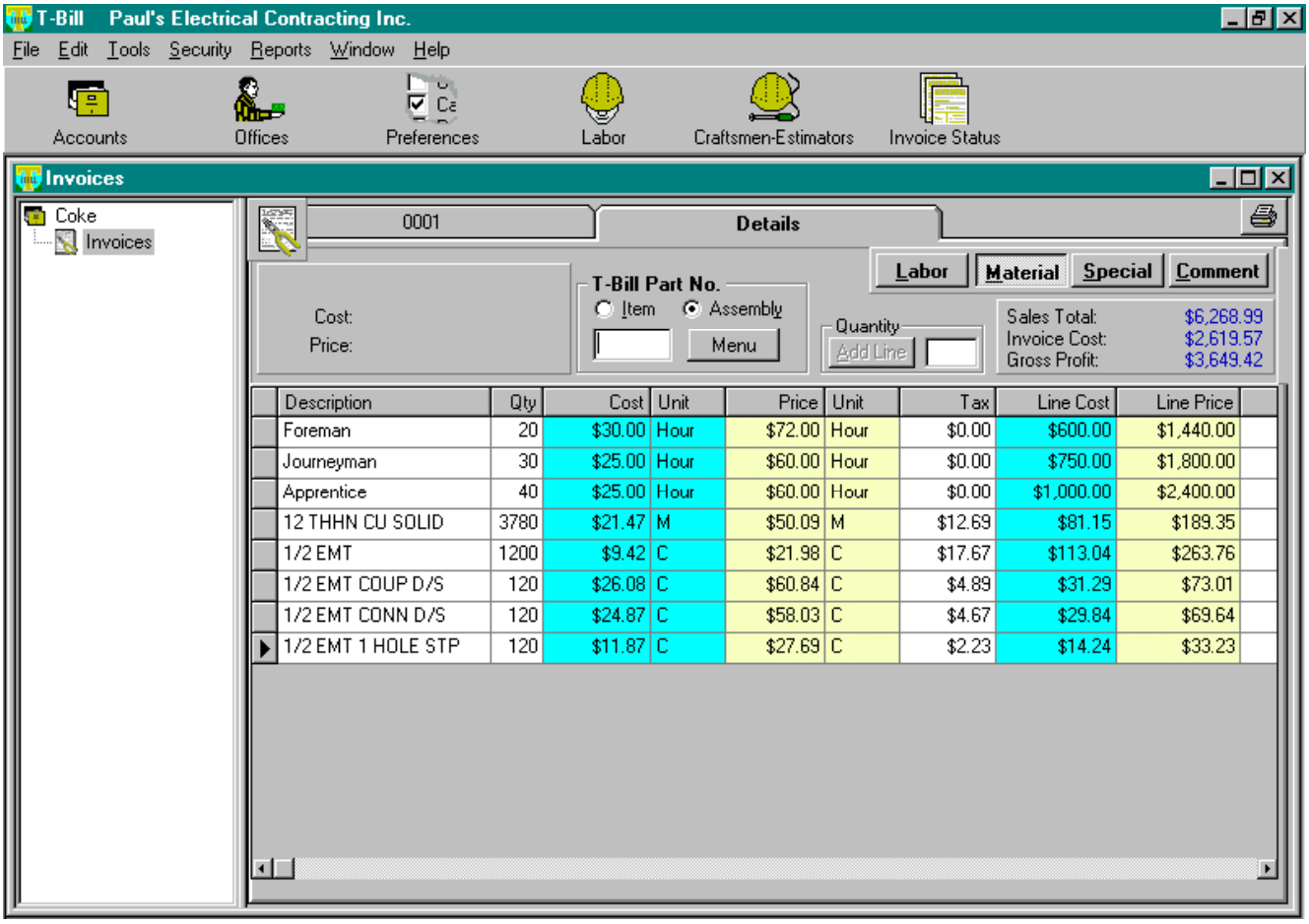
# Invoices (contd.)




Whether using Find/Sort or Menu, once you have located the proper information to input, you will click on the **Transfer** button. The database window has been closed in the above example to simplify the screen, but the pertinent information is in *blue* in the upper left corner. If the transferred data is an Assembly, all you see is the Assembly Name. If the transferred data is an Item, you will also see your **Cost** and the customer's **Price** (including markup).

Transfer will also activate the **Quantity** window with a cursor. All you do is input the quantity from the Work Order and click on **Add Line** or hit **Enter**.

Invoices (contd.)




The above example shows the resulting invoice for 1200 feet of the previously selected Assembly for 3 #12 1/2" EMT D/S. Notice that instead of just the Assembly, it actually shows the "breakdown" of the Assembly into its individual components or byproducts and the quantities are automatically computed. This is why any input that can be done using Assemblies is recommended, since it will save you time having to locate, calculate and input individual items.

Now that we have an example of the working invoice, let's discuss the different columns and what they represent:

- **Description** – The description of individual Items (input either manually or by "breakdown" of an Assembly) from the database.
- **Qty** – The input quantity, gotten from the Work Order provided by the leadman in the field.
- **Cost** – Your cost of this item (pre-selected for this office when you did Set-up Wizard).
- **Unit** – The unit of measure that applies to this item's cost (per Each, Hundred, Thousand)

## Invoices (contd.)

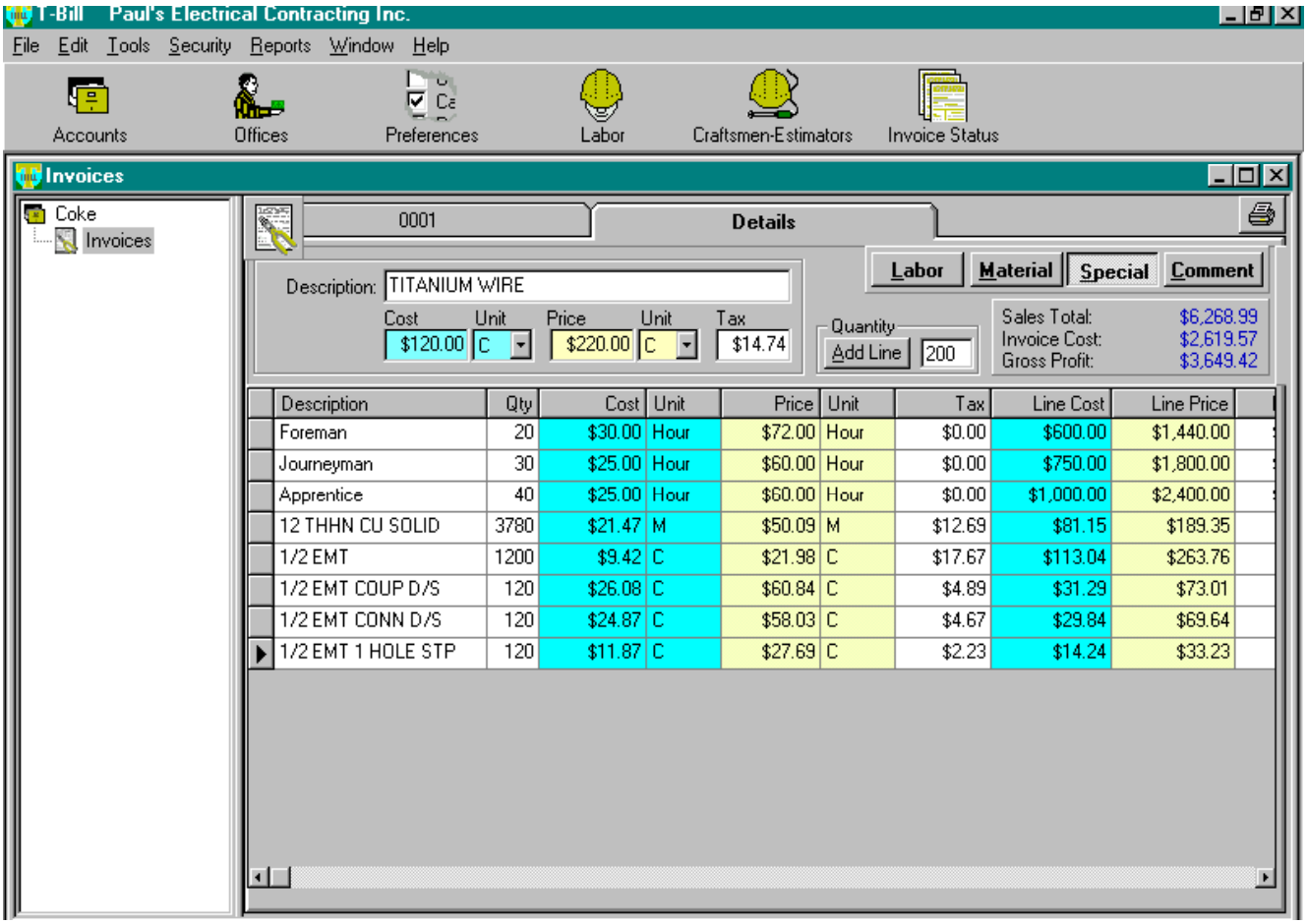
- **Price** – Your customer's price, including markup from the invoice "cover sheet".
- **Unit** – The unit of measure that applies to this item's cost (per Each, Hundred, Thousand)
- **Tax** – The applicable Tax, as identified on the invoice "cover sheet".

**NOTE:** In the example, notice that the Labor is not taxed, while the Material is.

- **Line Cost** – The Cost times the Qty total (your total Cost).
- **Line Price** – The Price times the Qty total (your customer's total Price).
- **Line Total (Not Shown)** – The Line Price plus Tax total (your customer's Total).

**Tip:** You can "rearrange" the columns to reflect the order you want the data to appear, such as the cost data all together followed by the price data all together, ending with tax and totals. To do this, simply click on the column heading you want to move, hold and move where you want it. It should also be said that you could adjust the column widths as well for those of you who need to show the mega bucks that you charge.

# Invoices (contd.)

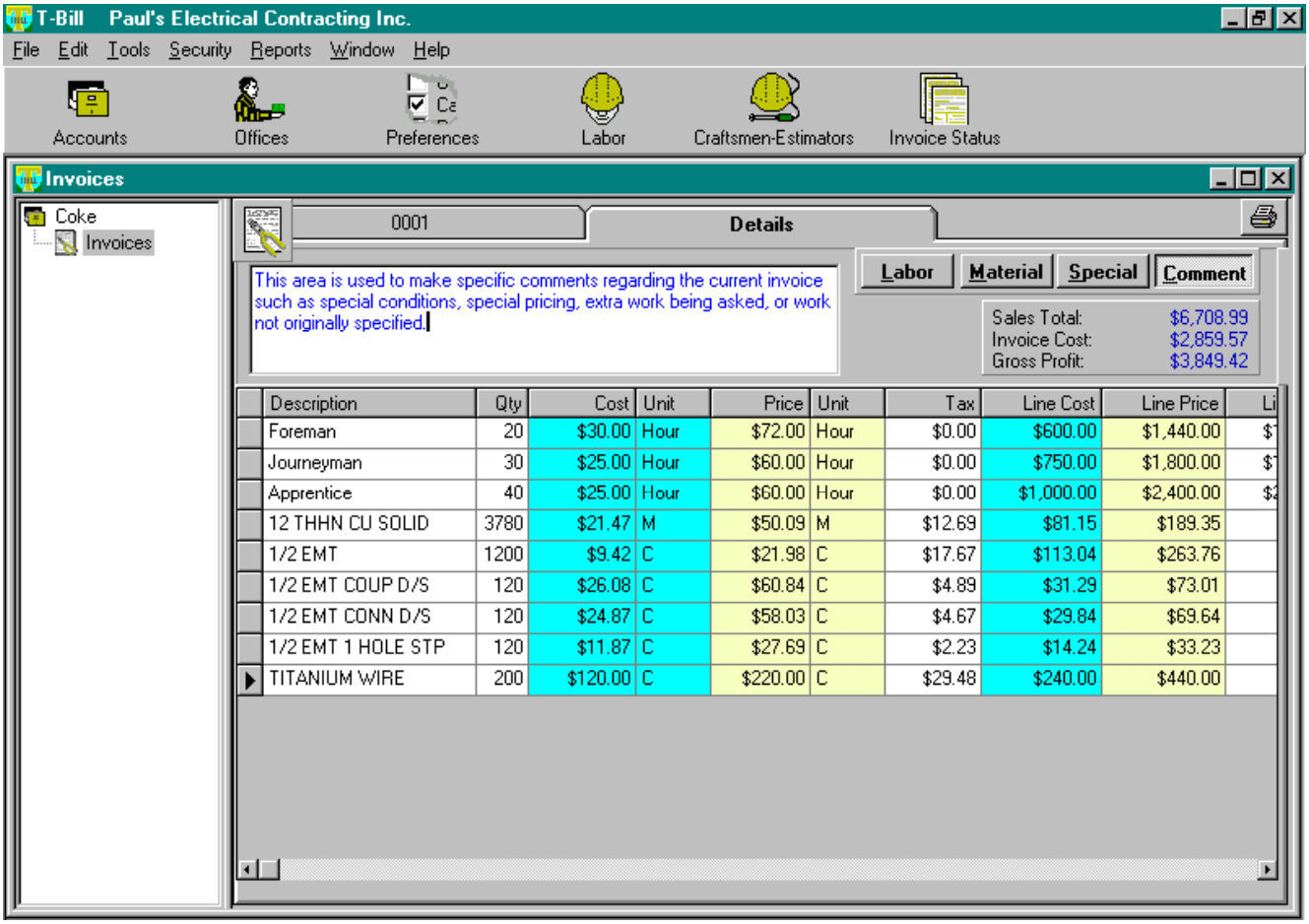

T-Bill Paul's Electrical Contracting Inc.
File Edit Tools Security Reports Window Help
Accounts
Offices
Preferences
Labor
Craftsmen-Estimators
Invoice Status
Invoices
Coke
Invoices
0001
Details
Labor
Material
Special
Comment
Description: TITANIUM WIRE
Cost $120.00 Unit C
Price $220.00 Unit C
Tax $14.74
Quantity
Add Line 200
Sales Total: $6,268.99
Invoice Cost: $2,619.57
Gross Profit: $3,649.42
Description Qty Cost Unit Price Unit Tax Line Cost Line Price
Foreman 20 $30.00 Hour $72.00 Hour $0.00 $600.00 $1,440.00
Journeyman 30 $25.00 Hour $60.00 Hour $0.00 $750.00 $1,800.00
Apprentice 40 $25.00 Hour $60.00 Hour $0.00 $1,000.00 $2,400.00
12 THHN CU SOLID 3780 $21.47 M $50.09 M $12.69 $81.15 $189.35
1/2 EMT 1200 $9.42 C $21.98 C $17.67 $113.04 $263.76
1/2 EMT COUP D/S 120 $26.08 C $60.84 C $4.89 $31.29 $73.01
1/2 EMT CONN D/S 120 $24.87 C $58.03 C $4.67 $29.84 $69.64
1/2 EMT 1 HOLE STP 120 $11.87 C $27.69 C $2.23 $14.24 $33.23

Another way of inputting invoice data is using the **Special** option. This will allow you to add items to the invoice that may be special ordered, custom made, or otherwise not in your existing database.

It will provide a field for you to fill in whatever **Description** you want to give the item, and you will input the *actual* **Cost/Unit** for yourself, the *actual* **Price/Unit** for the customer (*including markup*). The program will supply the **Tax**, leaving you to supply the **Quantity**. You then click on **Add Line** or **Enter**.

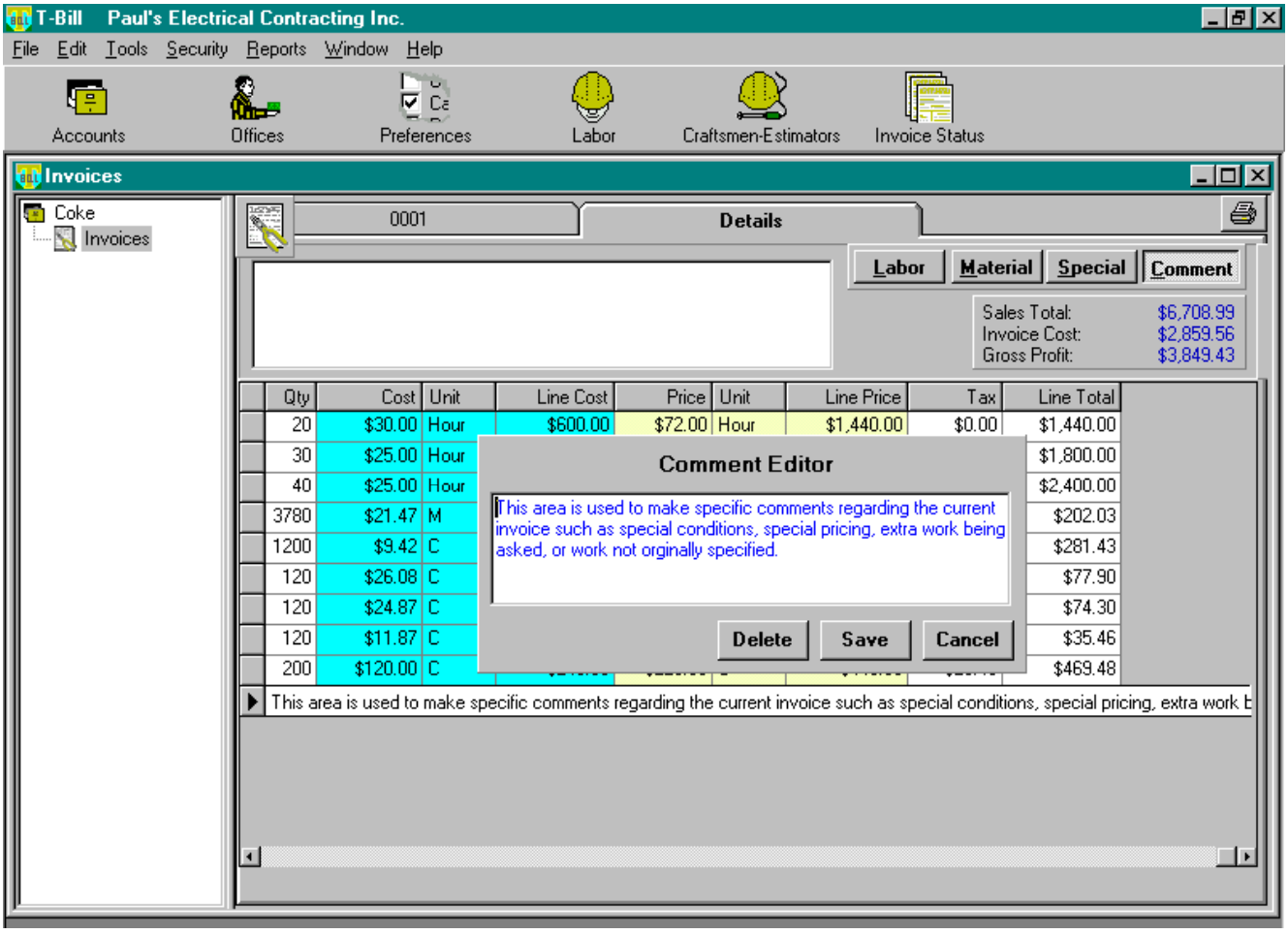
> **NOTE:** You will notice in the upper right corner of your invoice window how the program is tracking the **Sales Total**, **Invoice Cost** and **Gross Profit** for this invoice as you are inputting, so you can see at a glance exactly where you stand.

## Invoices (contd.)


T-Bill Paul's Electrical Contracting Inc.
File Edit Tools Security Reports Window Help
Accounts
Offices
Preferences
Labor
Craftsmen-Estimators
Invoice Status
Invoices
Coke
Invoices
0001
Details
Labor
Material
Special
Comment
This area is used to make specific comments regarding the current invoice such as special conditions, special pricing, extra work being asked, or work not originally specified.
Sales Total: $6,708.99
Invoice Cost: $2,859.57
Gross Profit: $3,849.42
Description Qty Cost Unit Price Unit Tax Line Cost Line Price
Foreman 20 $30.00 Hour $72.00 Hour $0.00 $600.00 $1,440.00
Journeyman 30 $25.00 Hour $60.00 Hour $0.00 $750.00 $1,800.00
Apprentice 40 $25.00 Hour $60.00 Hour $0.00 $1,000.00 $2,400.00
12 THHN CU SOLID 3780 $21.47 M $50.09 M $12.69 $81.15 $189.35
1/2 EMT 1200 $9.42 C $21.98 C $17.67 $113.04 $263.76
1/2 EMT COUP D/S 120 $26.08 C $60.84 C $4.89 $31.29 $73.01
1/2 EMT CONN D/S 120 $24.87 C $58.03 C $4.67 $29.84 $69.64
1/2 EMT 1 HOLE STP 120 $11.87 C $27.69 C $2.23 $14.24 $33.23
TITANIUM WIRE 200 $120.00 C $220.00 C $29.48 $240.00 $440.00

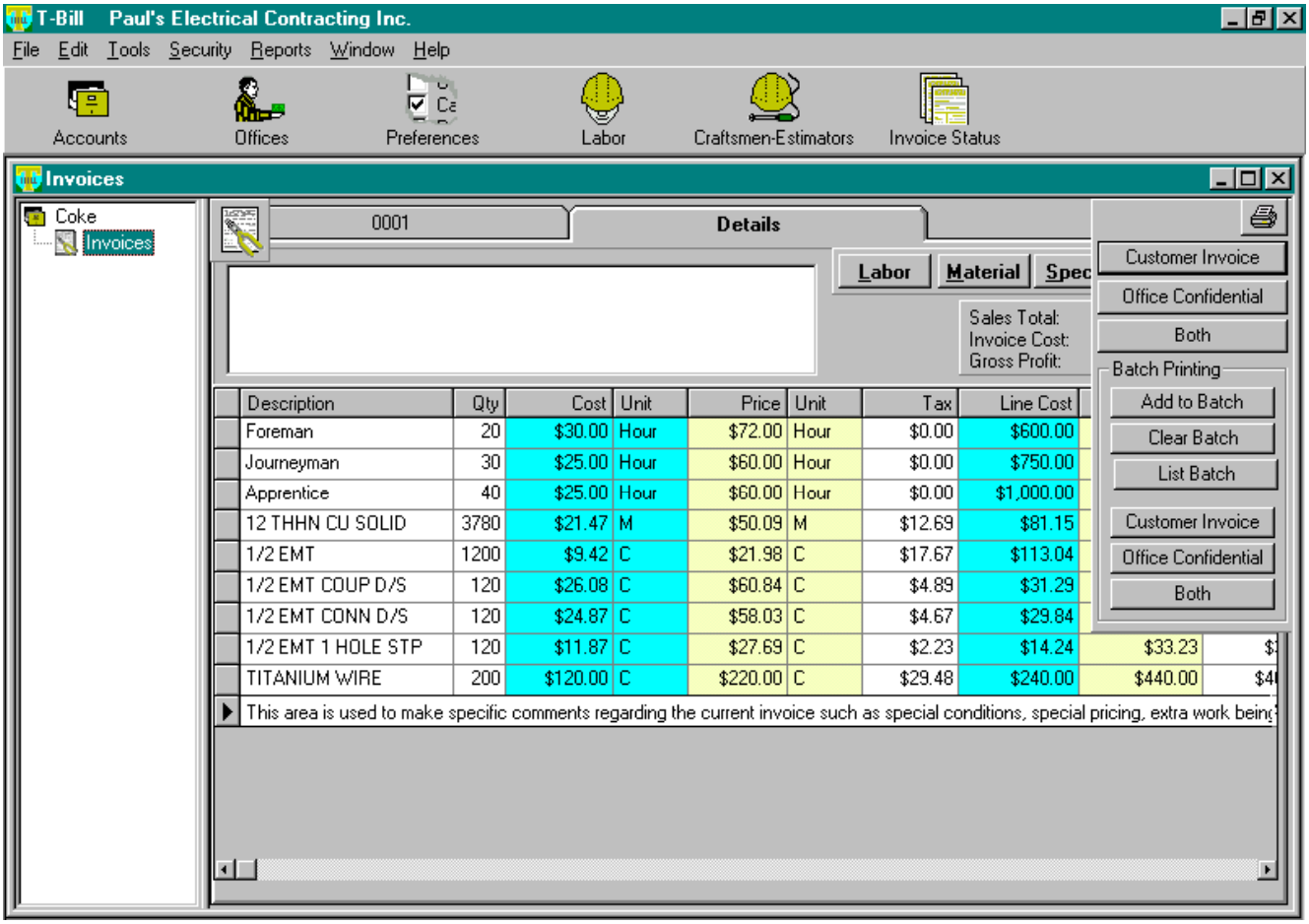
Finally, you can input comments at any time during the invoice process. These comments can precede specific work done, such as during a weekend, or clarify an action that has already been invoiced.

## Invoices (contd.)


T-Bill Paul's Electrical Contracting Inc.
File Edit Tools Security Reports Window Help
Accounts
Offices
Preferences
Labor
Craftsmen-Estimators
Invoice Status
Invoices
Coke
Invoices
0001
Details
Labor
Material
Special
Comment
Sales Total: $6,708.99
Invoice Cost: $2,859.56
Gross Profit: $3,849.43
Qty Cost Unit Line Cost Price Unit Line Price Tax Line Total
20 $30.00 Hour $600.00 $72.00 Hour $1,440.00 $0.00 $1,440.00
30 $25.00 Hour $1,800.00
40 $25.00 Hour $2,400.00
3780 $21.47 M $202.03
1200 $9.42 C $281.43
120 $26.08 C $77.90
120 $24.87 C $74.30
120 $11.87 C $35.46
200 $120.00 C $469.48
Comment Editor
This area is used to make specific comments regarding the current invoice such as special conditions, special pricing, extra work being asked, or work not orginally specified.
Delete
Save
Cancel
This area is used to make specific comments regarding the current invoice such as special conditions, special pricing, extra work b

At this time, the comment will appear as the next line in the invoice and there is no way to "move" it to any other location. The comment shows on the working invoice in the space available. You can see the entire comment by double clicking on it and bringing up the **Comment Editor**. This will also allow you to make changes to the existing comment and save it, or delete it entirely.

## Invoices (contd.)


T-Bill Paul's Electrical Contracting Inc.
File Edit Tools Security Reports Window Help
Accounts
Offices
Preferences
Labor
Craftsmen-Estimators
Invoice Status
Invoices
Coke
Invoices
0001
Details
Labor
Material
Customer Invoice
Office Confidential
Both
Batch Printing
Add to Batch
Clear Batch
List Batch
Customer Invoice
Office Confidential
Both
Sales Total:
Invoice Cost:
Gross Profit:
Description Qty Cost Unit Price Unit Tax Line Cost
Foreman 20 $30.00 Hour $72.00 Hour $0.00 $600.00
Journeyman 30 $25.00 Hour $60.00 Hour $0.00 $750.00
Apprentice 40 $25.00 Hour $60.00 Hour $0.00 $1,000.00
12 THHN CU SOLID 3780 $21.47 M $50.09 M $12.69 $81.15
1/2 EMT 1200 $9.42 C $21.98 C $17.67 $113.04
1/2 EMT COUP D/S 120 $26.08 C $60.84 C $4.89 $31.29
1/2 EMT CONN D/S 120 $24.87 C $58.03 C $4.67 $29.84
1/2 EMT 1 HOLE STP 120 $11.87 C $27.69 C $2.23 $14.24 $33.23
TITANIUM WIRE 200 $120.00 C $220.00 C $29.48 $240.00 $440.00
This area is used to make specific comments regarding the current invoice such as special conditions, special pricing, extra work being

Okay, at some point you will either complete the invoice or want to review what you have done as a printed document. Clicking on the **Printer** icon in the very top right corner will bring up your print choices. As review, you can choose either the **Customer Invoice** or **Office Confidential** separately or view **Both**. Another option available is sending finished invoices to a **Batch Printing** so they can all be printed at a later time and all at once. Again, you can batch just the Customer Invoice, Office Confidential or Both. You can also see a **Batch List** and **Clear Batch** the entire list if desired.

The following two pages are examples of the Customer Invoice and Office Confidential respectively.

> **NOTE:** The following example of Customer Invoice shows a logo. This is possible if you have your company logo as a *.bmp file. If you do, let us know and we will help you set it up. This is the only default location of the logo in our invoice, allowing the use of plain bond paper.

## Invoices (contd.)

# INVOICE

Invoice Number: 0001
Date: 15 Nov 2001
Page 1 of 1

Paul's Electrical Contracting Inc.
1234 W. Nowhere Ln.
Suite 123
Anywhere, AZ 85000

Billing Address:

**Coca-Cola Bottling Co.**
1234 N. Bottletop Way
Suite 123
Phoenix, AZ 85220

MCCORMICK

| Quantity | Description | Price | Amount |
|---|---|---|---|
| 20.000 | Foreman | $72.00 Hour | $1,440.00 |
| 30.000 | Journeyman | 60.00 Hour | $1,800.00 |
| 40.000 | Apprentice | 60.00 Hour | $2,400.00 |
| 3780.000 | 12 THHN CU SOLID | 50.09 M | $189.35 |
| 1200.000 | 1/2 EMT | 21.98 C | $263.76 |
| 120.000 | 1/2 EMT COUP D/S | 60.84 C | $73.01 |
| 120.000 | 1/2 EMT CONN D/S | 58.03 C | $69.64 |
| 120.000 | 1/2 EMT 1 HOLE STP | 27.69 C | $33.23 |
| 200.000 | TITANIUM WIRE | 220.00 C | $440.00 |
| | This area is used to make specific comments regarding the current invoice such as special conditions, special pricing, extra work being asked, or work not orginally specified. | | |

Terms: 60 Days

| | |
|---|---|
| Subtotal Labor: | $5,640.00 |
| Subtotal Material: | $1,068.99 |
| Subtotal: | $6,708.99 |
| Tax: | $71.62 |
| **Total:** | **6,780.61** |

**Amount Due: $ 6,780.61**

11/15/01 10:27 pm

## Invoices (contd.)

CONFIDENTIAL

Paul's Electrical Contracting Inc.

Coca-Cola Bottling Co.
1234 N. Bottletop Way
Suite 123
Phoenix, AZ 85220

**Craftsman:** Paul Nordin
**Estimator:** Todd McCormick

Bill Number: 0001 Date: 24 Oct 2001 Page: 1

| Quantity | Description | Price | Amount | Cost | Amount | TX |
|---|---|---|---|---|---|---|
| 20.000 | Foreman | $ 72.00000 h | $ 1,440.00 | $ 30.00000 h | $600.00 | A |
| 30.000 | Journeyman | 60.00000 h | 1,800.00 | 25.00000 h | $750.00 | 0 |
| 40.000 | Apprentice | 60.00000 h | 2,400.00 | 25.00000 h | $1,000.00 | 0 |
| 3780.000 | 12 THHN CU SOLID | 50.09200 M | 189.35 | 21.46800 M | $81.15 | B |
| 1200.000 | 1/2 EMT | 21.98000 C | 263.76 | 9.42000 C | $113.04 | B |
| 120.000 | 1/2 EMT COUP D/S | 60.84400 C | 73.01 | 26.07600 C | $31.29 | B |
| 120.000 | 1/2 EMT CONN D/S | 58.03000 C | 69.64 | 24.87000 C | $29.84 | B |
| 120.000 | 1/2 EMT 1 HOLE STP | 27.69200 C | 33.23 | 11.86800 C | $14.24 | B |
| 200.000 | TITANIUM WIRE | 220.00000 C | 440.00 | 120.00000 C | $240.00 | B |

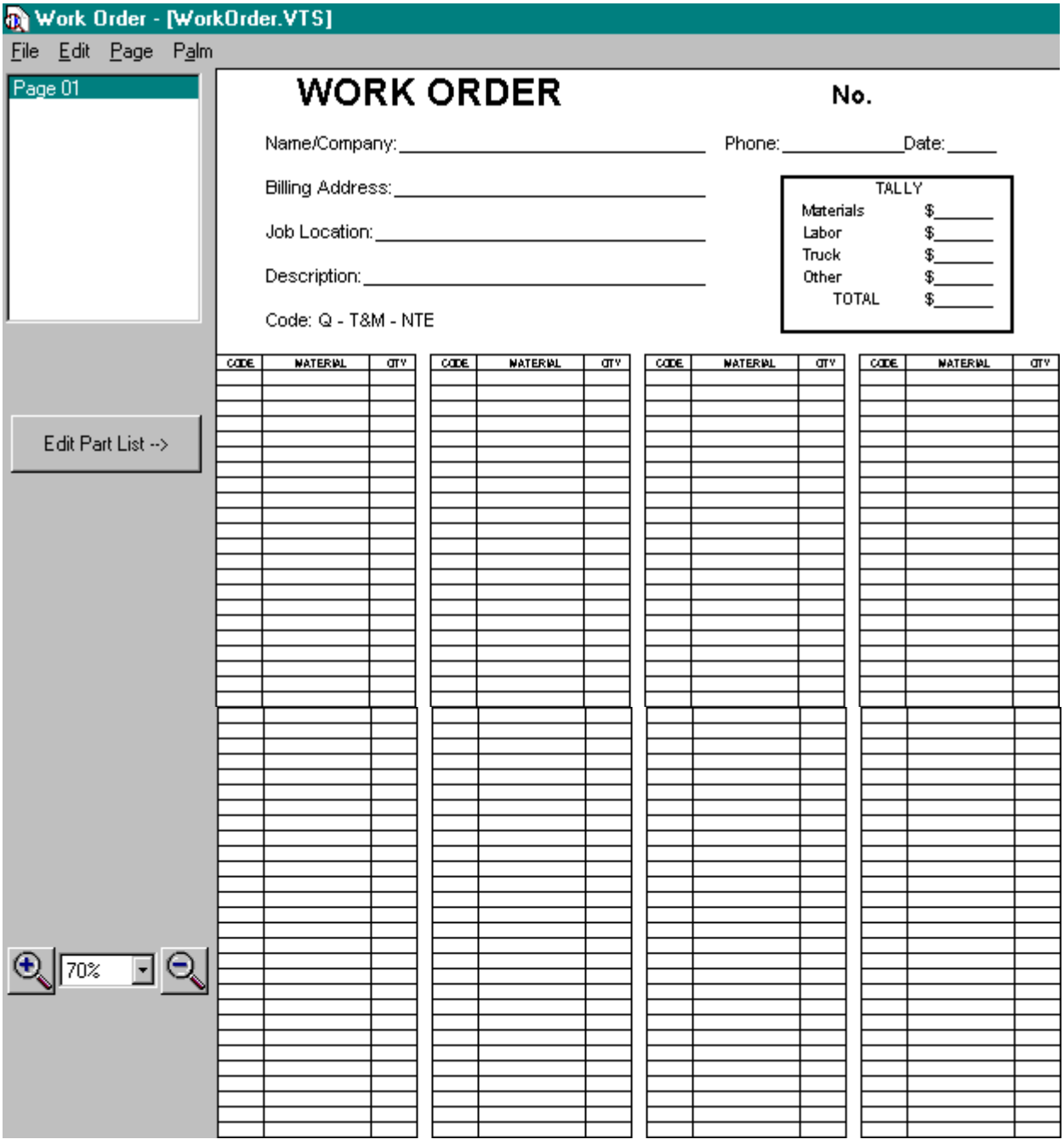
This area is used to make specific comments regarding the current invoice such as special conditions, special pricing, extra work being asked, or work not originally specified

**Tax Code Legend**

| Code | Description | Percent |
|---|---|---|
| B | Arizona State | 6.70 |
| | | 6.70 |

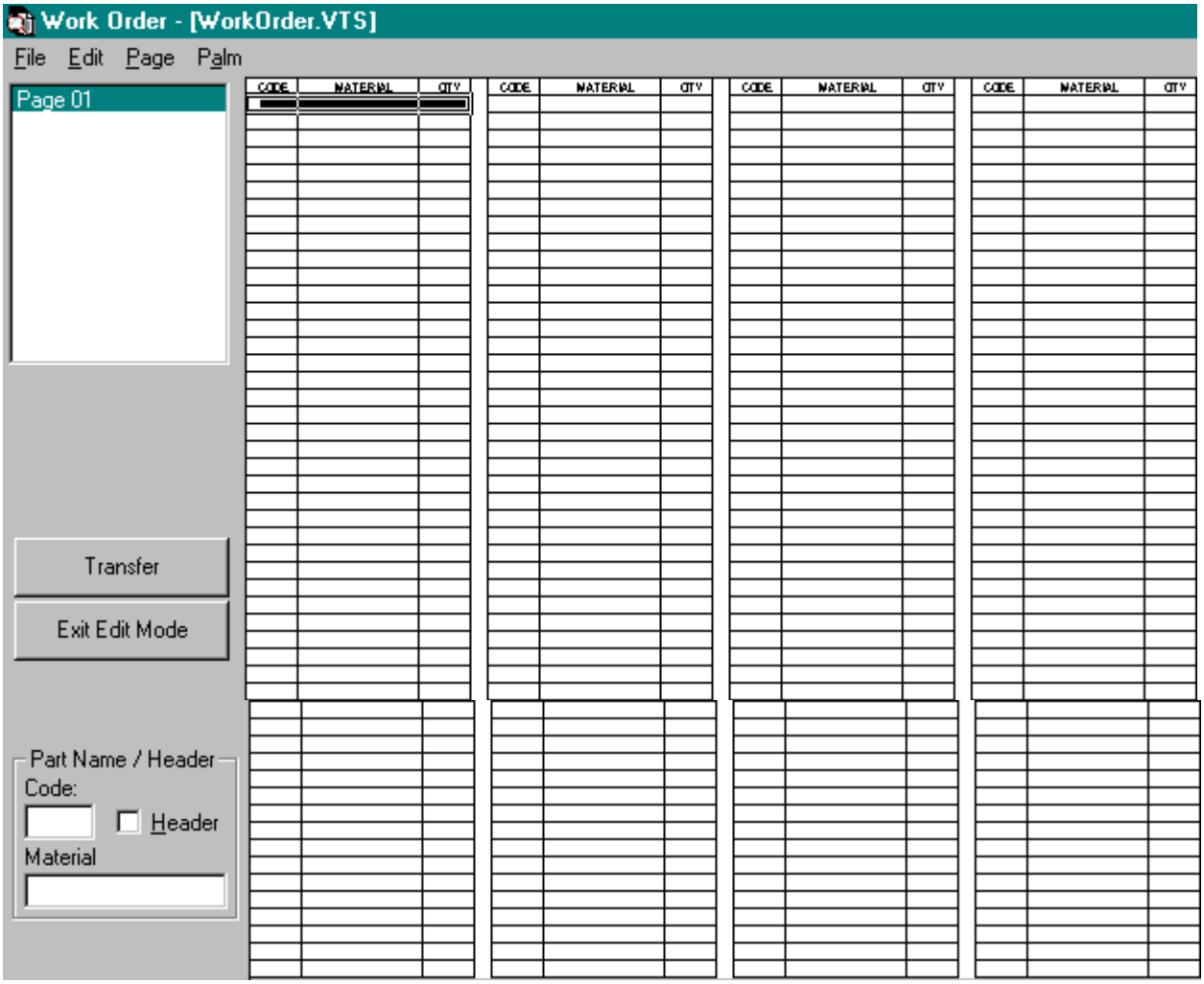
| | | | |
|---|---|---|---|
| Subtotal: | $6,708.99 | Total Cost: | $2,859.57 |
| Tax: | $71.62 | Profit: | $3,849.42 |
| **Total:** | **$6,780.61** | Percent: | 134.62% |

# Work Orders



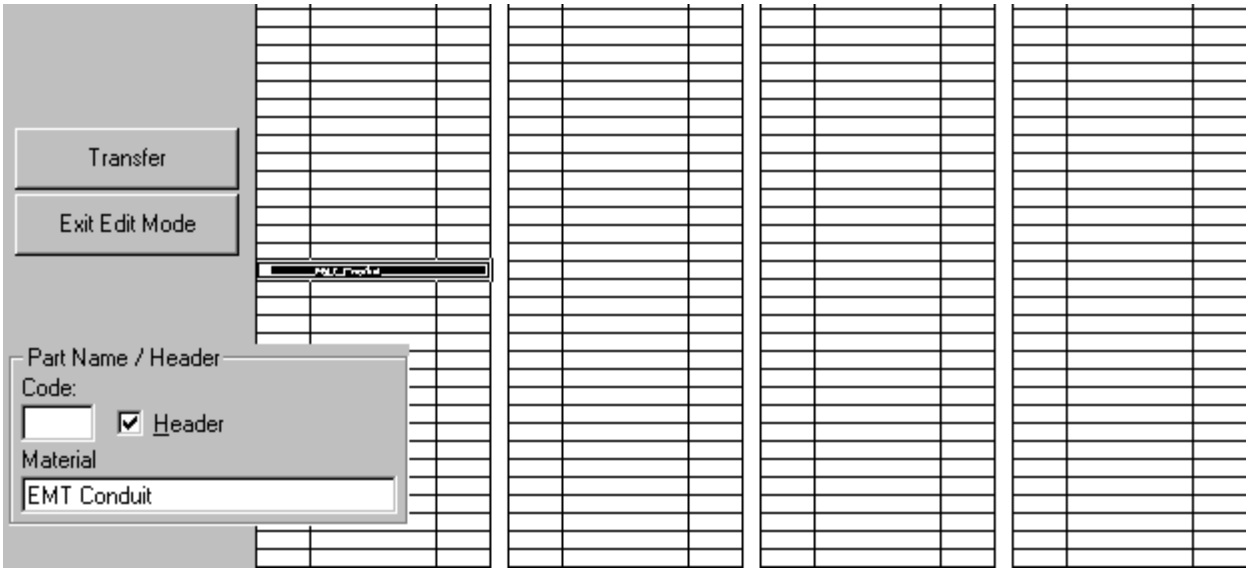

The Windows T-Bill program also allows the user to create custom Work Orders for the workers in the field. It will work directly off the database you are using for the Invoices, so whatever material is used in the field will match for input in the Invoice. The Work Order can have both Items and Assemblies to facilitate the Invoicing process. The first step is to choose Edit Parts List from the above window when it appears.

## Work Orders (contd.)




Initially, you select **Edit Parts List** and the above window will appear. It will give you four columns in which to assign either **Items** or **Assemblies** from the **Import Parts List** (discussed later). You can group your lists by assigning **Headers** to the different groups for ease of locating by you field personnel.

## Work Orders (contd.)

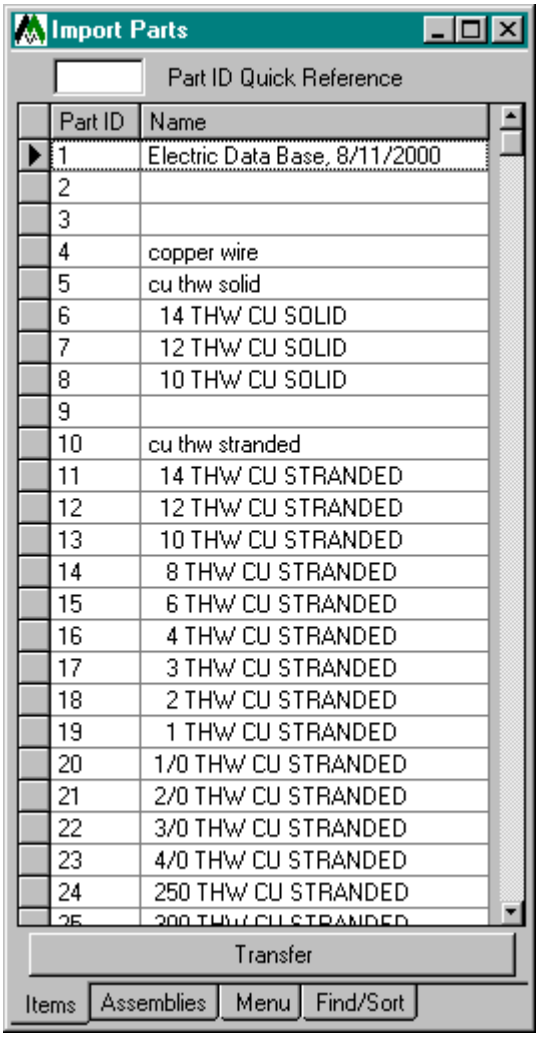



To create Headers, choose a blank line in a column by clicking on it. Then click in the **Header** box in the **Part Name/Header** field in the lower left corner of the form. Type in the desired Header in the **Material** field and verify the spelling/content. **Verify** *prior* to moving off the line since the form is not "sizeable" and difficult to read in it's editing format.

> **NOTE:** Headers can be created first and the remainder "filled in", or they can be created on an "as needed" basis if you are not sure what final form the Work Order will take.

> **TIP:** Choose some way to differentiate between the actual Items/Assemblies and Headers. The program itself will help by making Headers appear as a separate field without columns for Code or Qty, but you can help further by choose to use different text, i.e. both upper and lower case as in the above example.

## Work Orders (contd.)



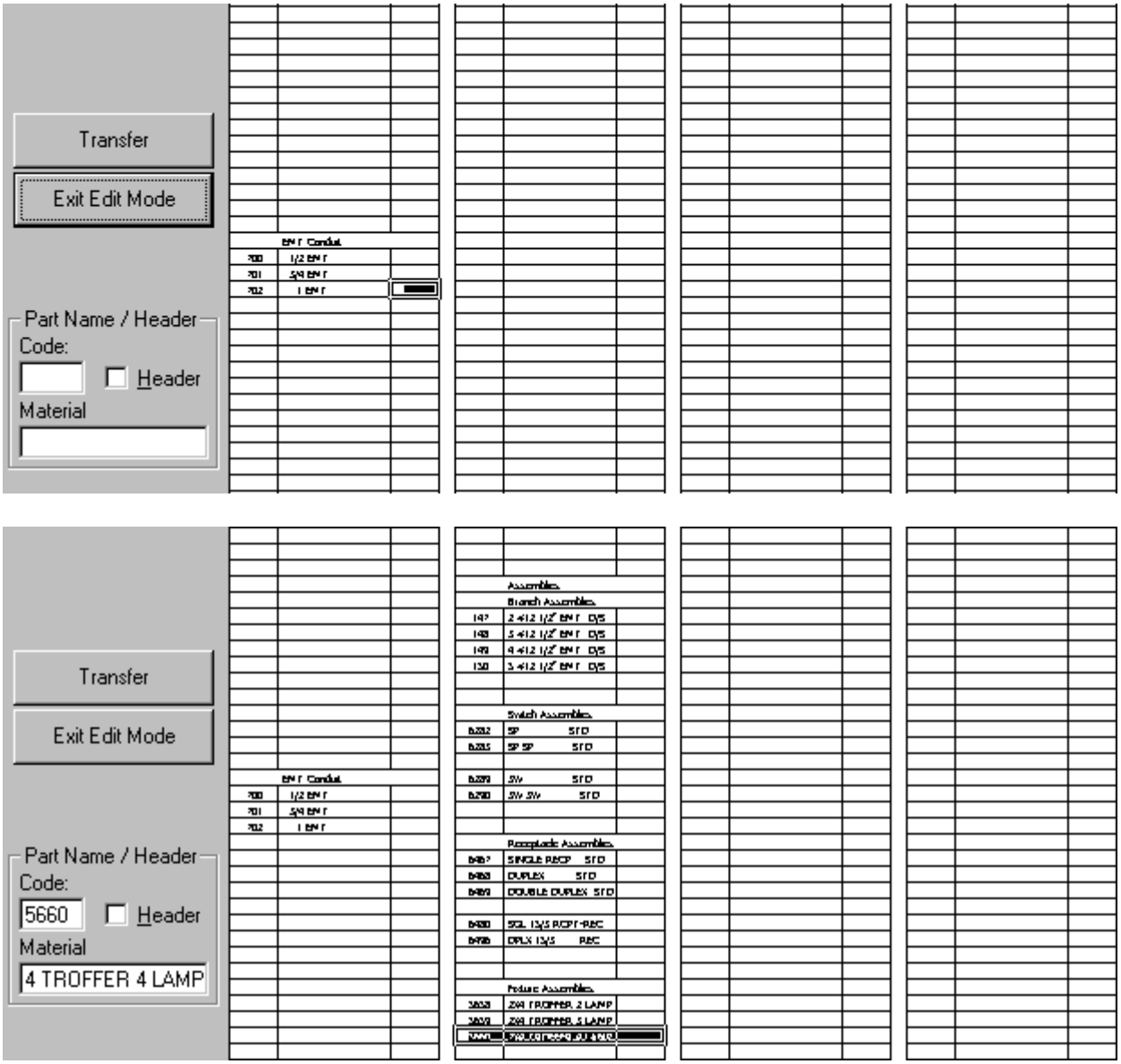

The **Import Parts** list represents the database you have chosen for the Win T-Bill program. You will assign both Items and Assemblies from this database to the Work Order.

Since this is the exact same database used by the Invoice, the **Part ID** becomes the **Code** in the Work Order and will also be the number used when locating that part for Invoicing.

> **NOTE:** You have the ability to switch between the Item and Assembly databases as well as using the Menu and Find/Sort options as already covered.

Once an Item or Assembly has been located, choose a blank line in the Work Order and choose **Transfer** in this window or **Transfer** on the Work Order itself.

## Work Orders (contd.)




The above examples show the results of transferring Items (first column) and setting up a dedicated section for Assemblies and subsequent transferring of the desired Assemblies (second column).

You can create as many pages as needed for the Work Order and you can also *"cut and paste"* entire sections of the Import Parts to save time setting up the form.

When you have completed the form, you can choose the **Exit Edit Mode** button here or simply close the **Import Parts** window. This will return you to the "master" Work Order.

## Work Orders (contd.)

| | | |
|---|---|---|
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| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | EMT Conduit | |
| 700 | 1/2 EMT | |
| 701 | 3/4 EMT | |
| 702 | 1 EMT | |
| | | |
| | | |
| | | |
| | | |
| | | |

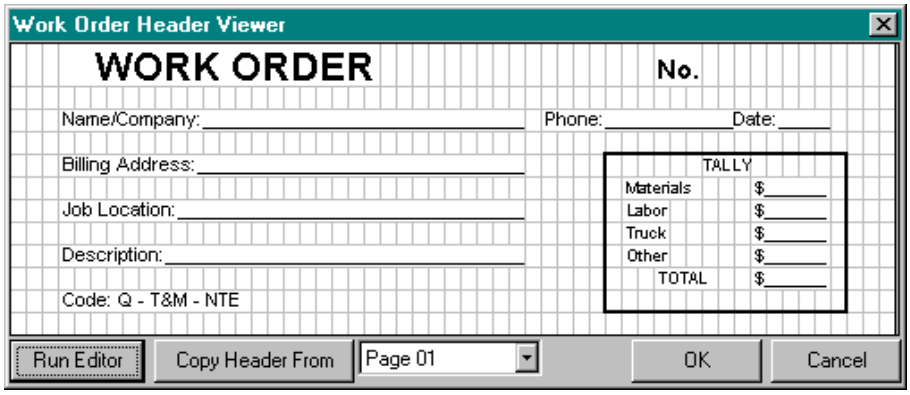
| | | |
|---|---|---|
| | Assemblies | |
| | Branch Assemblies | |
| 147 | 2 #12 1/2" EMT D/S | |
| 148 | 3 #12 1/2" EMT D/S | |
| 149 | 4 #12 1/2" EMT D/S | |
| 150 | 5 #12 1/2" EMT D/S | |
| | | |
| | | |
| | Switch Assemblies | |
| 6282 | SP STD | |
| 6283 | SP SP STD | |
| | | |
| 6289 | 3W STD | |
| 6290 | 3W 3W STD | |
| | | |
| | | |
| | Receptacle Assemblies | |
| 6467 | SINGLE RECP STD | |
| 6468 | DUPLEX STD | |
| 6469 | DOUBLE DUPLEX STD | |
| | | |

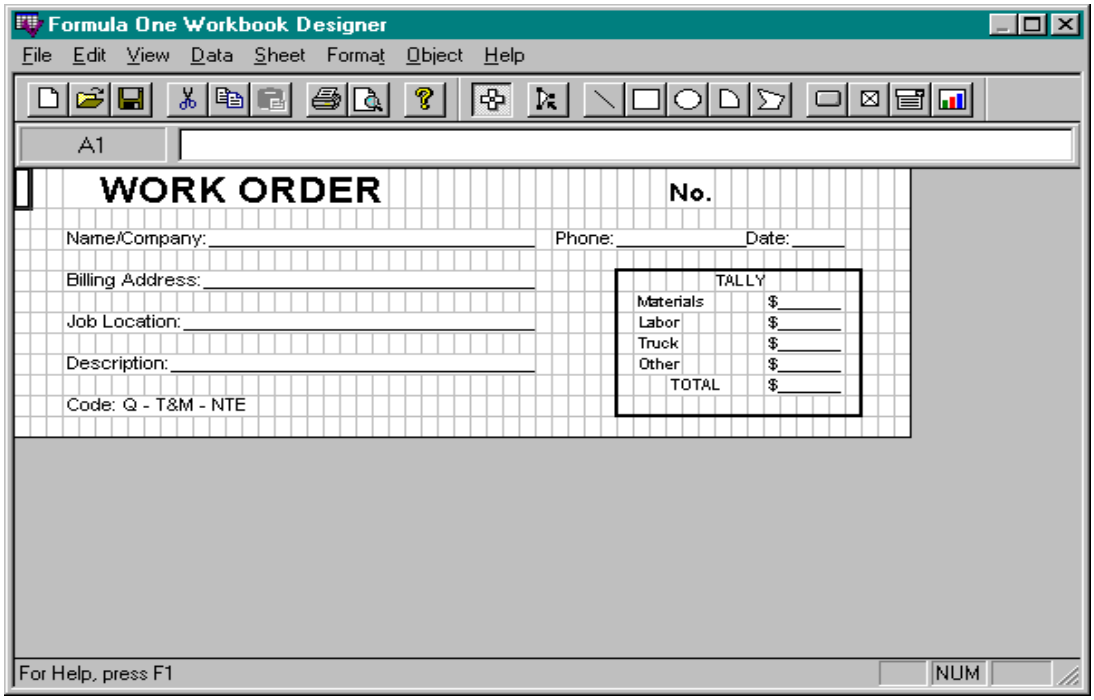
The above example is the resulting Work Order at 150% showing the **Code, Description** and blank **Qty** columns. Remember, the Codes under the Assemblies section are referencing the Assembly database.

**NOTE:** You can create any number of Work Orders in any amount of pages. For example, you may decide to create a Work Order specifically for hospitals and another for retail. You have full "Save As" capability. We even have some "templates" available within the program that may fit your needs with minor editing. ***When creating more than one page Work Orders, you must stay in Edit mode***.

**TIP:** Keep the number of pages to a minimum, and you could print these Work Orders out back to back on a heavier stock of paper to make them a little more resistant to "wear and tear" in the field

## Work Orders (contd.)



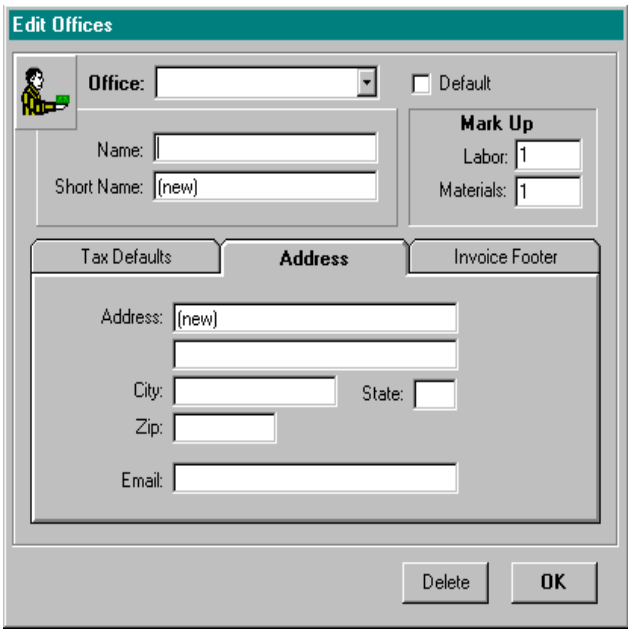



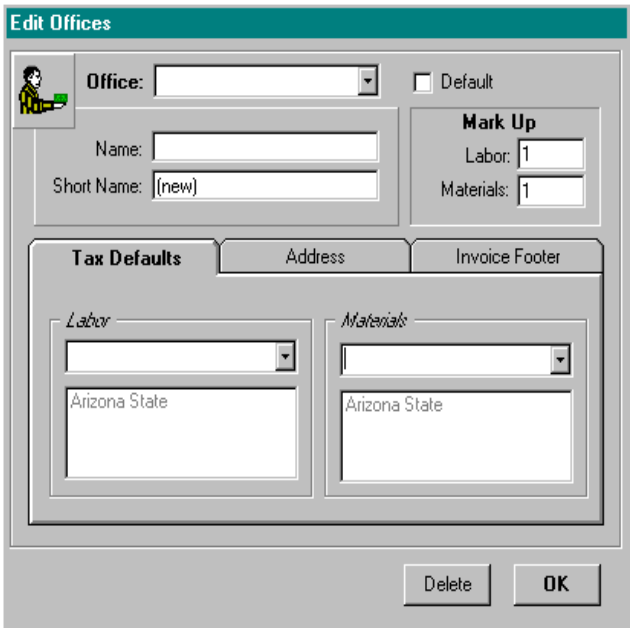

In addition to creating/editing the body of the Work Order, you can also create/edit headers for the Work Order itself. To do so, choose Edit from the pulldown in the "master" Work Order and choose Header. Once the header is open, you can then choose Run Editor and make your changes.

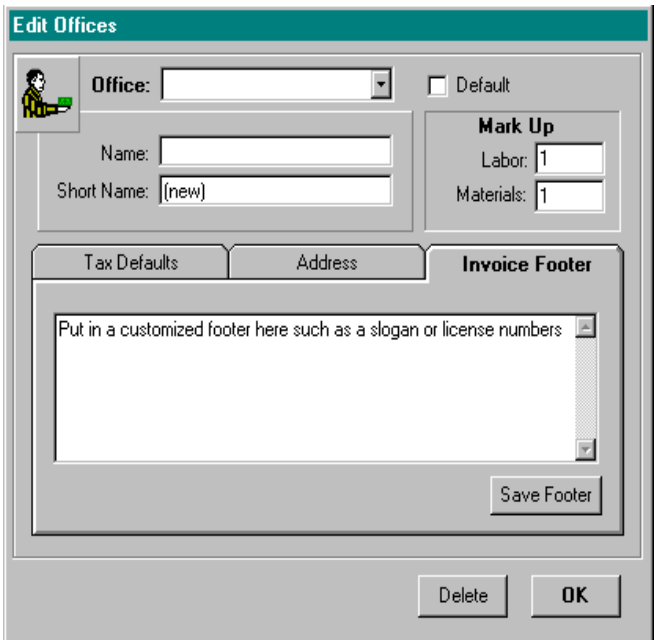
**TIP:** You might decide to make a Header on a subsequent page that would serve as a signed "Authorization" statement for the work completed.

# Icons

## Office



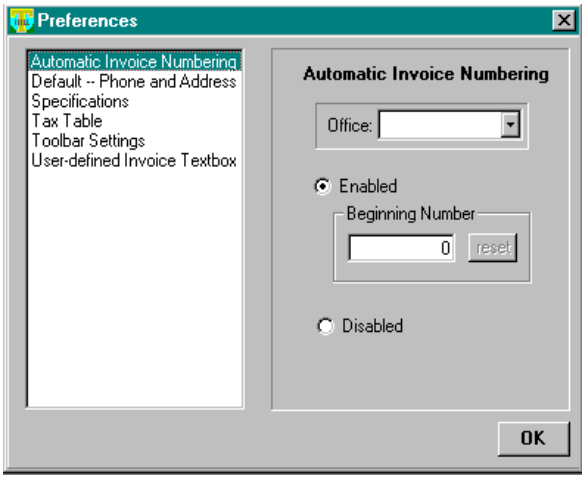



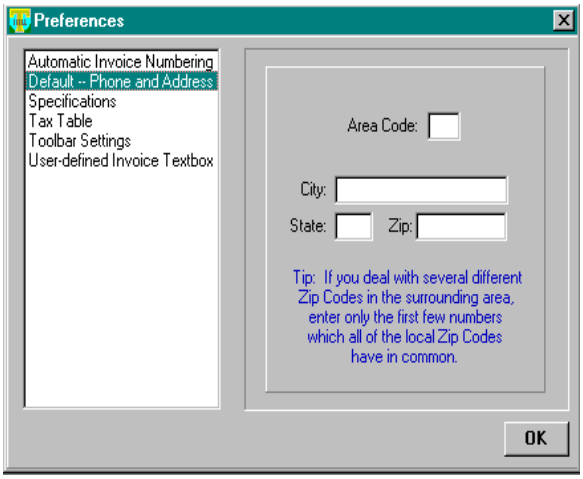




This icon will allow you to edit existing **Offices** and add future Offices to your program. The three areas affected are **Address, Tax Defaults** and **Invoice Footer**. Remember, you must *create* the Taxes in Preferences (covered later) first and *then* add to the Office list. The Invoice Footer (as shown) can be your contractor license, established date, slogan, etc.

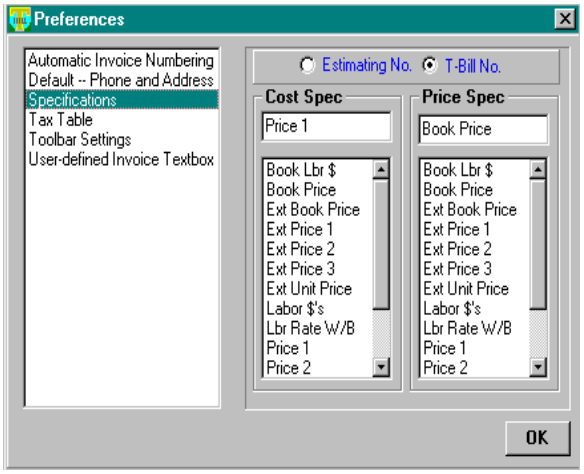
# Icons (contd.)

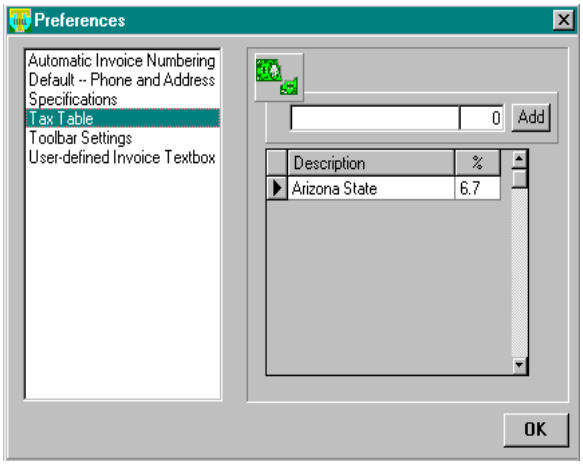
## Preferences





Preferences
Automatic Invoice Numbering
Default -- Phone and Address
Specifications
Tax Table
Toolbar Settings
User-defined Invoice Textbox
Area Code:
City:
State:
Zip:
Tip: If you deal with several different Zip Codes in the surrounding area, enter only the first few numbers which all of the local Zip Codes have in common.
OK

Most of the fields involved in Invoices are covered under **Preferences**. These include **Automatic Invoice Numbering**, allowing the program to assign the next Invoice in sequence, yet you can set the precedence (such as including the year). Also, you can input the **Default Phone and Address** information used by the program. Make special note of the Tip: if given.



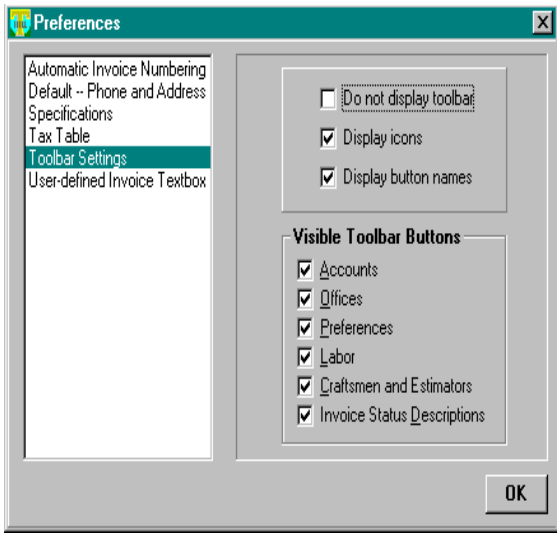



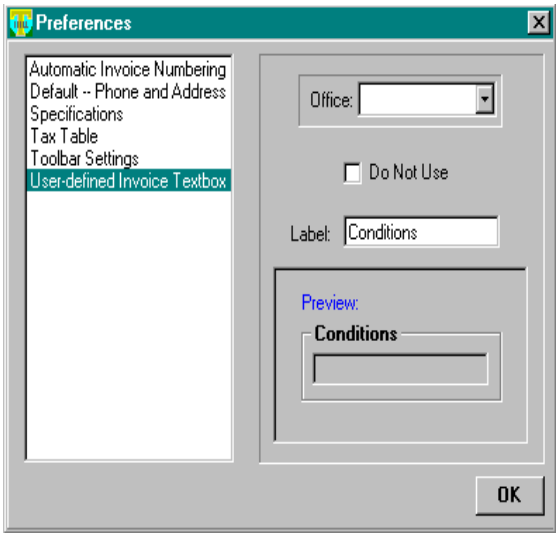

Next, is **Specifications** where you can change/choose what **Cost Spec** (your cost) and **Price Spec** (your customer's cost) to be used in the Invoice. You can also change/choose which database to be used by the program by selecting **Estimating No.** or **T-Bill No.**

You can also add/edit the Tax Table here in Preferences and later, choose from the updated list in the Office settings as applicable. You can add new taxes or change the rates of existing taxes.

## Icons (contd.)

## Preferences (contd.)



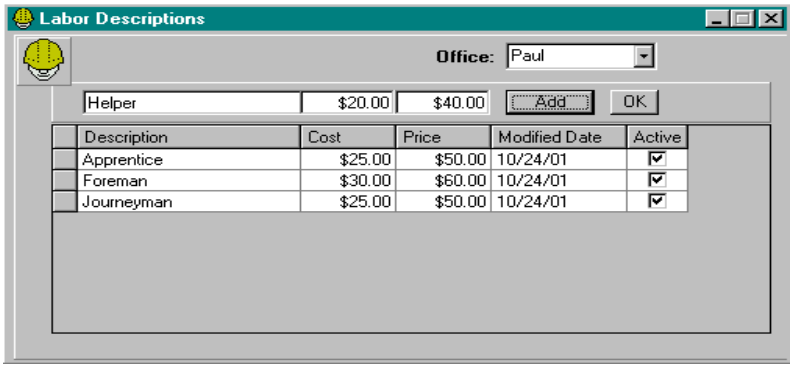




Finally, you can choose what Icons will actually show up within the program by checking/un-checking whichever Icons you want in **Toolbar Settings**. You can also decide not to show any.

The **User-defined Invoice Textbox** is located on the Invoice "cover sheet". This setting allows you to define what the text box is to be used for (the above example is called *"Conditions"*, but can be anything you decide). If you have no use for a text box, choose the **Do Not Use** option.

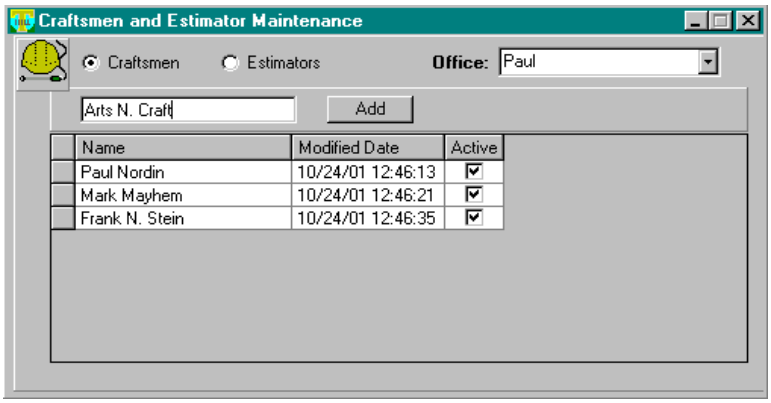
# Icons (contd.)

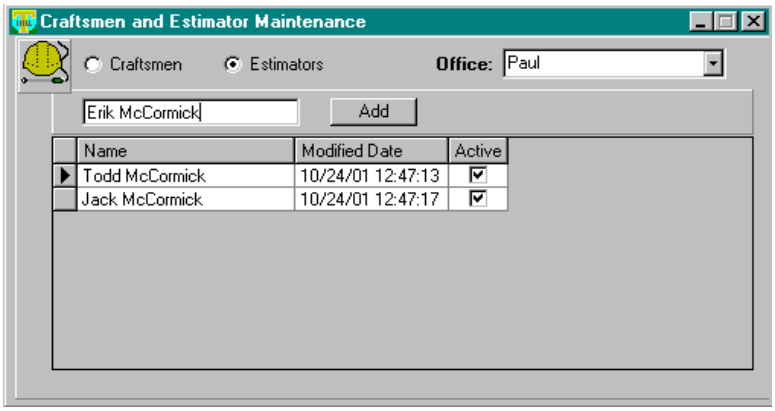
## Labor




Use this Icon to add/edit your **Labor** settings. You can change the **Cost/Price** and also decide if a particular labor is either **Active** (checked) or Inactive (un-checked). You can modify these settings per Office by choosing the correct Office from the pulldown in the upper right corner.

## Craftsman/Estimator

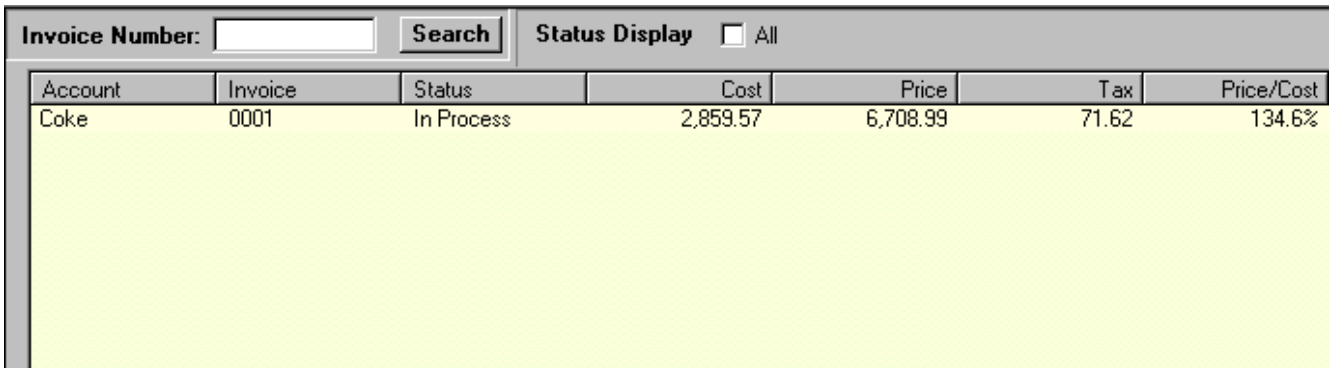


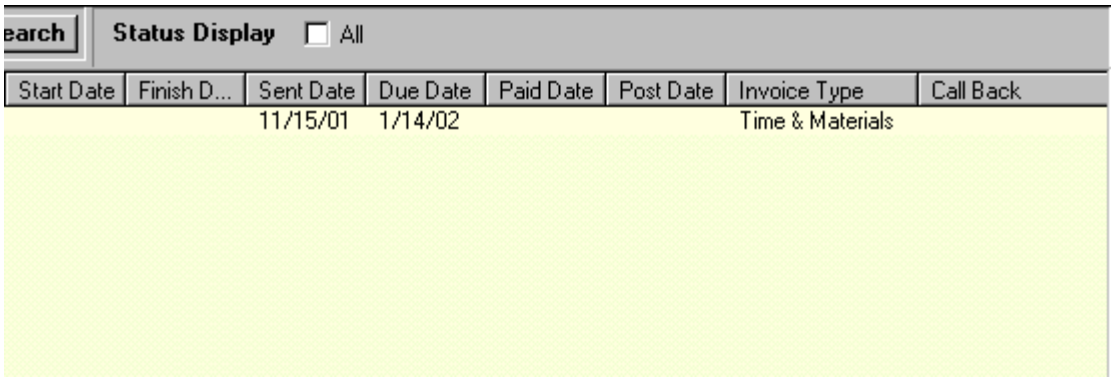




You can perform similar editing to the **Craftsmen/Estimators** from their own Icon and it is edited per Office as well. Notice they also has the ability to be either **Active** or Inactive by checking the box or not.

# Icons (contd.)

## Invoice Status




The final Icon is Invoice Status. This Icon will bring up a listing of ALL your invoices for the entire program. It will show the above information in a table form and list the Invoices in numerical order.

You can see that with very little imagination, this Icon would allow you to instantly know the status of any invoice, whether it is still "working", being "invoiced", "posted" and sent out "billed" with it's "due date" preset, and can even showed it's been "paid".

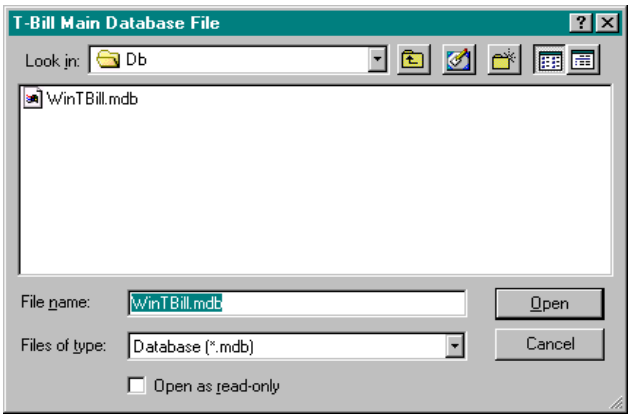
You also have the ability to "search" for a particular invoice for dedicated review. To review any Invoice in the list, simply double-click on it and it will go to whatever screen was last seen in Invoice, either the cover sheet or details.

# Pulldowns

Most of the pulldowns duplicate the functions of the icons with a few exceptions. The following is a quick reference to what is listed and examples of the mentioned exceptions. Remember, the pulldowns can be used if the icons are not showing.

## File

- **Select Office** – Allows you to change from one office to another if you have multiple offices.
- **Select Tbill Database** – This will bring up the below window where you can choose a different database. This option will be utilized if you setup a PDA (covered under separate documentation).




- **Add** – Gives you options of what you can add:
  - ***Account*** – Starts a new Account.
  - ***SubAccount*** – Create a SubAccount to an existing Account.
  - ***Invoice*** – Another way to start a new Invoice.
- **Delete** – Gives you options of what you can delete:
  - ***Account*** – Will delete an existing Account with a warning.
  - ***Invoice*** – Deletes an Invoice (including the number) with a warning.
- **Deactivate Account** – Allows you to deactivate an Account without deleting so the old Invoices are still available, but not allow new Invoices to be generated.
- **Exit** – Leave the program.

## Edit

Basically, anything that can be changed in the program is listed here:

- **Accounts** – Brings you back to your list of Accounts.
- **Offices** – Brings up the same as the Offices icon.
- **Preferences** – Brings up the same as the Preferences icon.
- **Labor** – Brings up the same as the Labor icon.

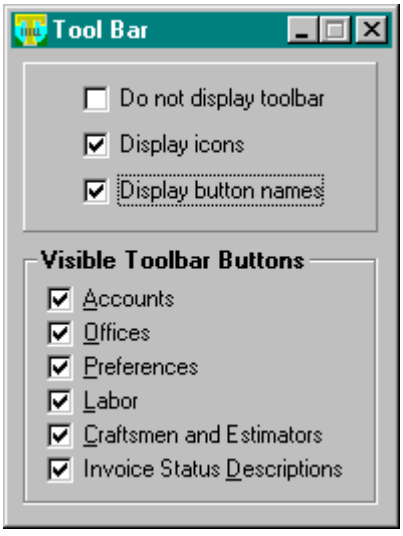
# Pulldowns (contd.)

## Edit (contd.)

- **Craftsman and Estimator** – Brings up the same as the Craftsman and Estimator icon.
- **Invoice Status Descriptions** – Brings up the same as the Invoice Status icon.

## Tools

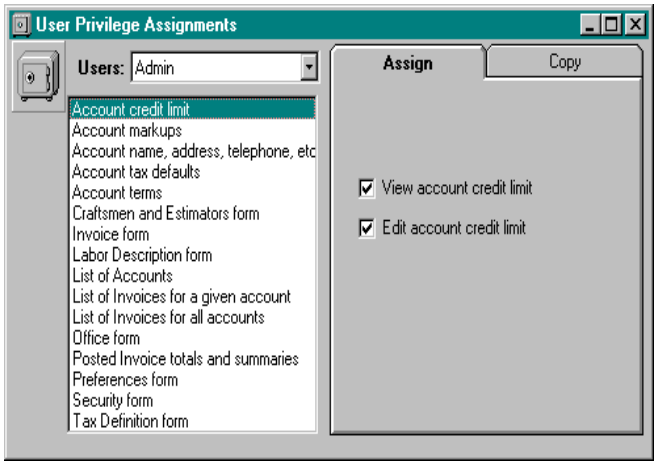
- **Work Order Utility** – This is the way you initialize the Work Order Utility covered previously in this manual.
- **Combine Invoice Items** – This option will bring Invoice items together.
- **Invoice Grid Layout** – These are the reset for how the invoice appears on you screen:
  - ***Reset Invoice Form Position*** – Resets where the Invoice is located on the screen.
  - ***Reset Column Width*** – Resets any changes you may have made to column widths to handle larger numbers.
  - ***Reset Column Order*** – Resets any changes you may have made to the order in which the columns appear within the Invoice.
  - ***Reset Row Height*** – Resets any changes you may have made to row heights.
- **T-Bill Setup Wizard** – Will usually be unavailable since the Wizard is only done once the first time you set up the program.
- **Customize Toolbar** – Will perform the same function as the selection in Preferences, but gives you direct access if the Toolbar is missing when you open the program. The below examples show the settings for No Toolbar and Toolbar respectively:

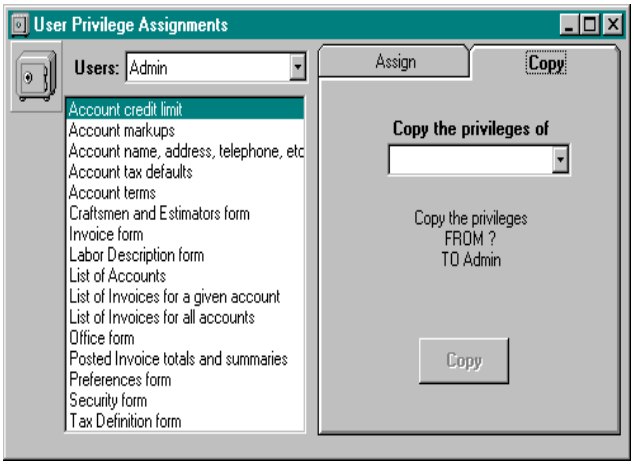



# Pulldowns (contd.)

## Security

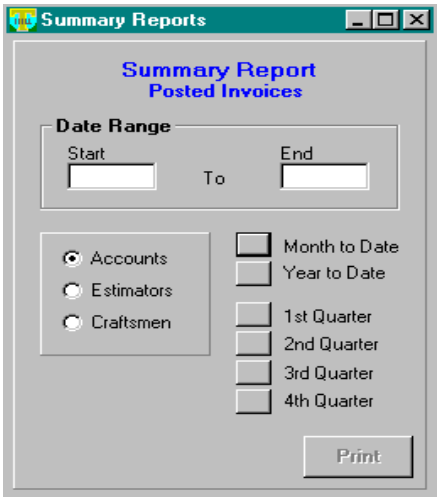
This option will allow you to setup Security for individual/multiple users of the program. This can be accomplished individually or by copying existing Security from another user.




## Reports

- **Summary Reports** – This option allows you to print reports based on Accounts, Estimators or Craftsmen and break it down further by Month, Year, Quarters or a specific date range.




- **Print Customer Invoice** – Prints the current Customer Invoice.
- **Print Office Confidential** – Prints the current Office Confidential Invoice.
- **Print Both Invoice and Confidential** – Prints both the current Invoices.
- **Batch Printing** – Will print whatever is in the Batch list:
  - ***Print Customer Invoice Batch*** – Prints only the Customer Invoices.

# Pulldowns (contd.)

## Reports (contd.)

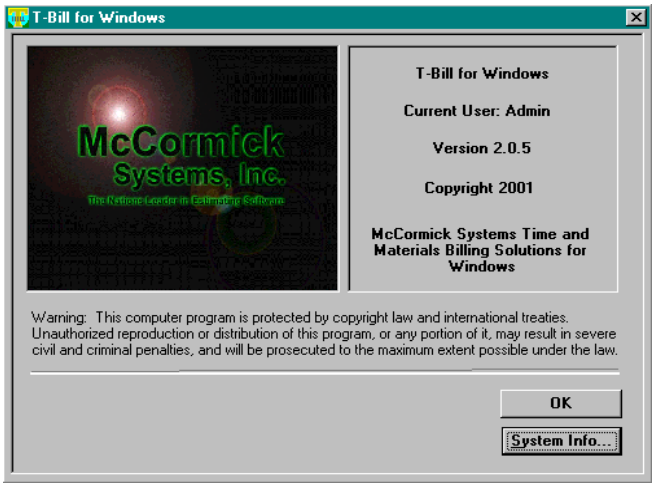
- ***Print Office Confidential Batch*** – Prints only the Office Confidential Invoices.
- ***Print Both Invoice and Confidential Batch*** – Prints all the Invoices.
- ***Clear Batch*** – Clears the entire Batch list.

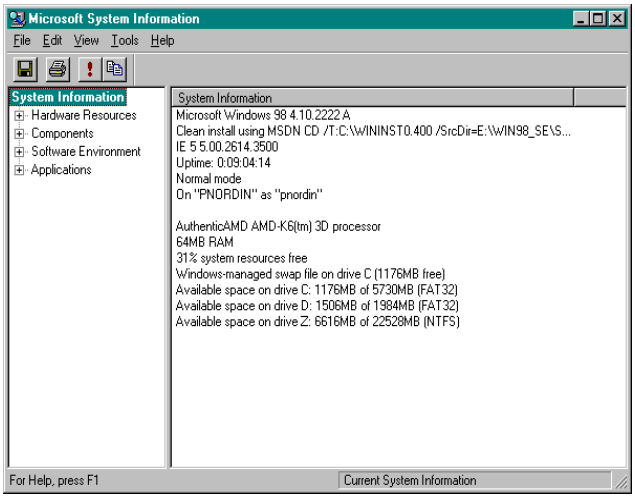
## Window

- **Cascade** – Minimal window setup on screen to allow multiple windows.
- **Tile Horizontal** – Maximum window setup to cover screen horizontally (default).
- **Tile Vertical** – Maximum window setup to cover screen horizontally (default).
- **Active** – List of invoices active.

## Help

The following Help screens give you data on the program and your system.


T-Bill for Windows
McCormick Systems, Inc.
T-Bill for Windows
Current User: Admin
Version 2.0.5
Copyright 2001
McCormick Systems Time and Materials Billing Solutions for Windows
Warning: This computer program is protected by copyright law and international treaties. Unauthorized reproduction or distribution of this program, or any portion of it, may result in severe civil and criminal penalties, and will be prosecuted to the maximum extent possible under the law.
OK
System Info...


Microsoft System Information
File Edit View Tools Help
System Information
Hardware Resources
Components
Software Environment
Applications
System Information
Microsoft Windows 98 4.10.2222 A
Clean install using MSDN CD /T:C:\WININST0.400 /SrcDir=E:\WIN98_SE\S...
IE 5 5.00.2614.3500
Uptime: 0:09:04:14
Normal mode
On "PNORDIN" as "pnordin"
AuthenticAMD AMD-K6(tm) 3D processor
64MB RAM
31% system resources free
Windows-managed swap file on drive C (1176MB free)
Available space on drive C: 1176MB of 5730MB (FAT32)
Available space on drive D: 1506MB of 1984MB (FAT32)
Available space on drive Z: 6616MB of 22528MB (NTFS)
For Help, press F1
Current System Information

# Notes:

# Section II

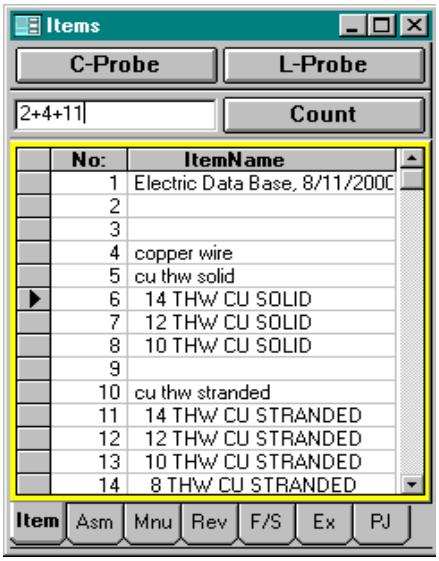
# Program/Database Support

# Database

Whether you use the T-Bill program along with the WinProducts estimating program or as a stand alone, you will have the ability to edit the database and customize it to your specific needs.

The following sections will assist you in these procedures.

# Items List



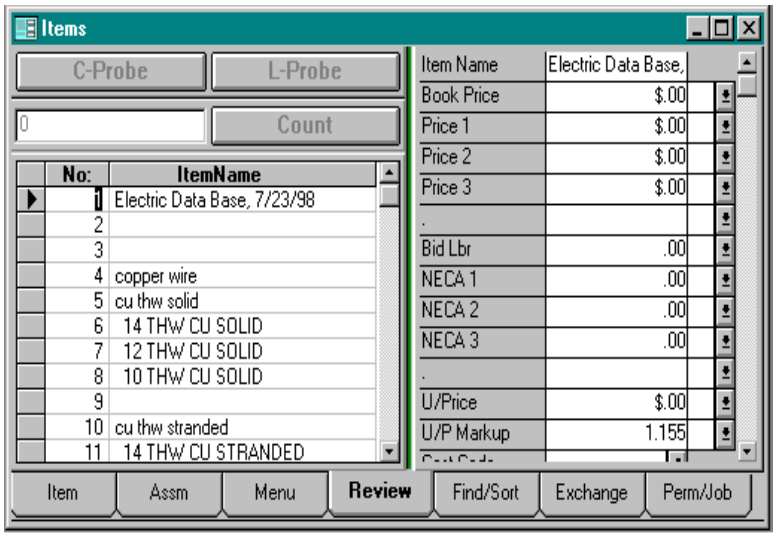

All Invoicing is accomplished by using either an Item or Assembly list. From here you may select and invoice your required materials. Pricing information is saved with the individual parts and may be viewed or modified using the Review tab.

The fundamental component of the database is an item. An item is an individual unit of material used for invoicing. Everything in the database is composed of items. Even the assemblies are made from items, although they are called by-products when used in an assembly.

It will help you to understand the database if you think of it as two parts:

- Item List – Contains price and labor specifications for individual items.
- Assembly List – Contains by-products, prices and labor information about assemblies. (A by-product is an item that is used as part of an assembly.)

# Item Review

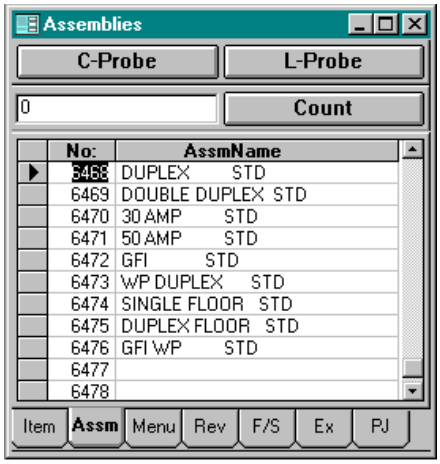



You will be spending a lot of time looking at the "Review" screen for your item and assembly lists as you arrange your items and assemblies in their proper positions within your database. While in Review mode you still retain all of the functionality of the original takeoff list. (For example: You may still access the Menu)

The names that appear in the review screen for item and assembly specifications and the order they appear in are not permanent. Some specs like Item #, Assembly Name, and some others may be descriptive enough the way they are. The best spec names are ones that are descriptive of your operation; they are the ones you will remember most easily. A description of some of the most common specs used for invoicing are listed below:

- **Book Price** – Can be changed manually (also updated by pricing services such as Trade Service® ,EPIC® or a specific supplier).
- **Price 1/Price 2/Price 3** – Multiples of Book Price (which can be set by the user). These specs CANNOT be changed manually.
- **DCI Code** – The code that pricing services use to match changes to be made to our database. It is an 11-digit number, the first six indicating the source of manufacture and the last five indicating the product. Most pricing utilizes this system, even if it is a supplier.
- **Header** – This indicates if the item is an actual item or to be used as a header. YES will allow the header to appear in an alphabetical listing of headers, NO will allow sorting by item.
- **P/Adj1, P/Adj2, P/Adj3** – The multipliers applied to Book Price to create Price1, Price2, and Price3.
- **Last Update** – This is the date/time that this item was last updated by a pricing program of some kind (TRASER®, EPIC®, or a supplier).
- **Item #** - The reference number of this item within the database. If this item is moved, due to inserting lines or moved to another part of the database, the Item # will change automatically and any assemblies using this item will also be updated automatically.

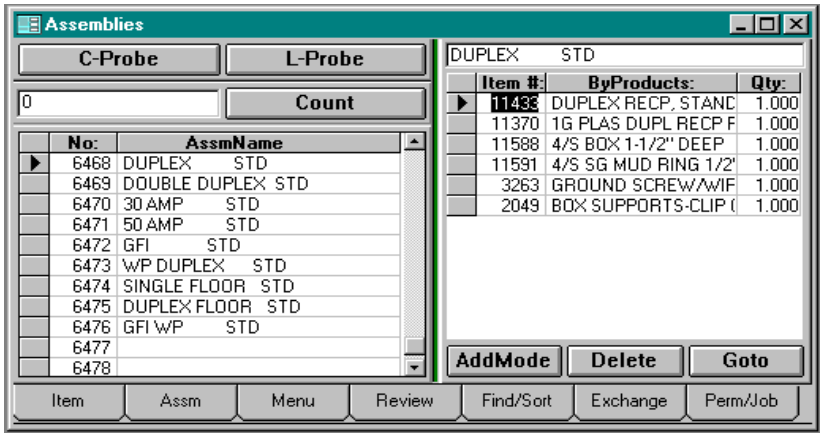
# Assembly List




An assembly is a collection of items (called by-products) that are frequently used together in the same fixed proportions. Exactly which items constitute an assembly varies with the construction trade, differences in the practice of that trade, variations in the building codes from area to area and your own preferences.

Everything in the database is either an item or an assembly. The advantage of using assemblies is that during the invoicing process, using one assembly results in invoicing all of the items the assembly is made of. In other words, assemblies group items together for invoicing, saving the time required to create an invoice item-by-item. Your assembly list can hold up to *60,000* assemblies. Each assembly can hold up to *256 by-products*.

# Assembly Review



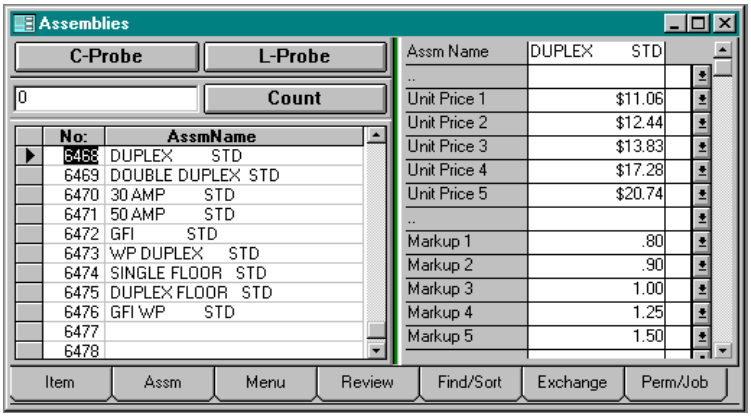

There are actually **two** different review screens for Assemblies (By-products and Specifications). You may toggle between the two screens by clicking on the Review tab again. When you first select the "Assembly Review" tab you are brought to the by-product screen. From here you may view or edit the individual items that make up an assembly.

# Assembly Review (contd.)

To build an assembly, you'll need at least two takeoff windows open. The first window must display the by-products for the assembly you're building. In the second takeoff window, you must select the item or assembly you want to add to the assembly you're building. Clicking on the AddMode button in the first window will cause a Transfer button to appear in the second.

> **Tip:** you can build assemblies with items or with other assemblies. To save time, consider starting a new assembly by copying a similar assembly and editing it to meet your own needs.

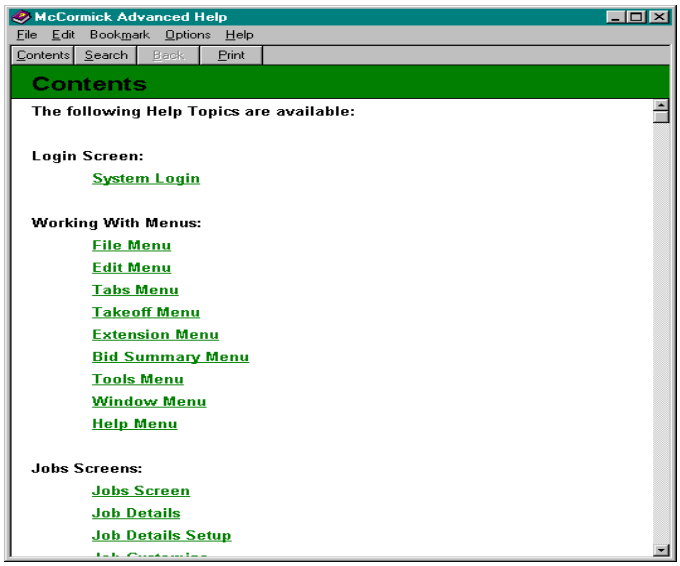
You will be spending a lot of time looking at the Review screen for your item and assembly lists as you arrange your items and assemblies in their proper positions within your database. While in Review mode you still retain all of the functionality of the original takeoff list. (For example – You may still access the Menu)



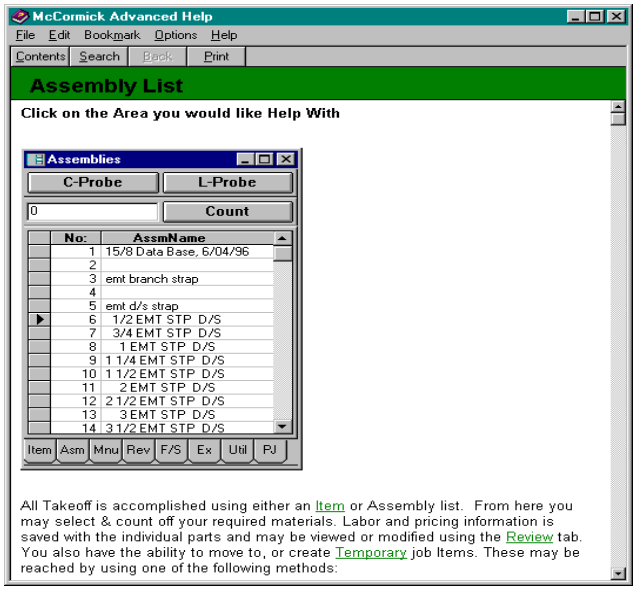

The names that appear in the review screen for item and assembly specifications and the order they appear in are not permanent. Some labels, like Item #, Assembly Name, and some others, may be descriptive enough the way they are. If so leave them as they are. The best labels are ones that are descriptive of your operation; they are the ones you will remember most easily. A description of some of the most common specs for invoicing are listed below:

- **Header** – This indicates if the item is an actual assembly or to be used as a header. YES will allow the header to appear in an alphabetical listing of headers, NO will allow sorting by assembly.
- **Last Update** – This is the last date the assembly by-product pricing was modified.
- **Assm #** - This is the reference number currently being used by this assembly. If this assembly is moved, due to inserting lines or moved to another part of the database, the Assm # will change automatically and will be updated automatically.
- **Composition Last Changed** – The date the last time the by-products for this assembly were modified.
- **Composition Last Changed By** – The user doing the changes to this assembly.

## Help




The basic Help screen, as shown above, is the typical "menu" style that most of us are familiar with from most Windows programs. The drawback with this style is you must know where the information is contained that you are looking for. The breakdown is pretty self-explanatory and shouldn't create too many problems, but we have provided a much more "user friendly" method of using Help.

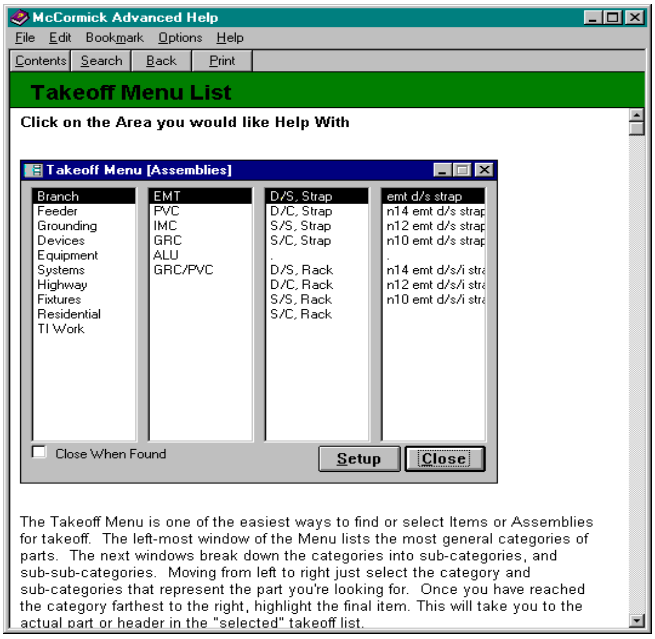

McCormick Advanced Help
File Edit Bookmark Options Help
Contents Search Back Print
Assembly List
Click on the Area you would like Help With
Assemblies
C-Probe
L-Probe
0
Count
No: AssmName
1 15/8 Data Base, 6/04/96
2
3 emt branch strap
4
5 emt d/s strap
6 1/2 EMT STP D/S
7 3/4 EMT STP D/S
8 1 EMT STP D/S
9 1 1/4 EMT STP D/S
10 1 1/2 EMT STP D/S
11 2 EMT STP D/S
12 2 1/2 EMT STP D/S
13 3 EMT STP D/S
14 3 1/2 EMT STP D/S
Item Asm Mnu Rev F/S Ex Util PJ
All Takeoff is accomplished using either an Item or Assembly list. From here you may select & count off your required materials. Labor and pricing information is saved with the individual parts and may be viewed or modified using the Review tab. You also have the ability to move to, or create Temporary job Items. These may be reached by using one of the following methods:

This alternative method is what we call "context sensitive". In other words it goes where you are in the program (this example is an Assembly takeoff window). To use this feature, put focus on the area in question; i.e., a takeoff window, menu, audit trail, etc. Then hit the <F1> key on your keyboard. It will bring up the help window for that area.

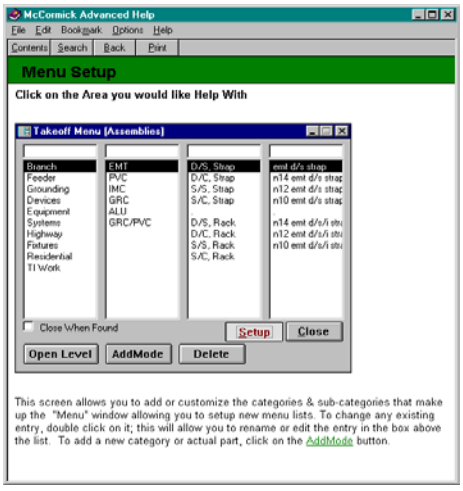
## Help (cont'd.)

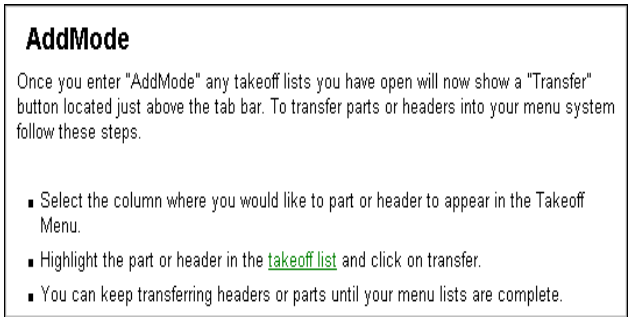
You will notice it also has the accompanying text describing the help topic and the green highlights that will lead to related information.

The note at the top of the window directs you to "Click on the Area you would like Help With". Moving the cursor around the image will produce a pointing finger. Point to the area you have a question on and do a single left click, such as menu below. This will then prompt the Help screen to go to that area.

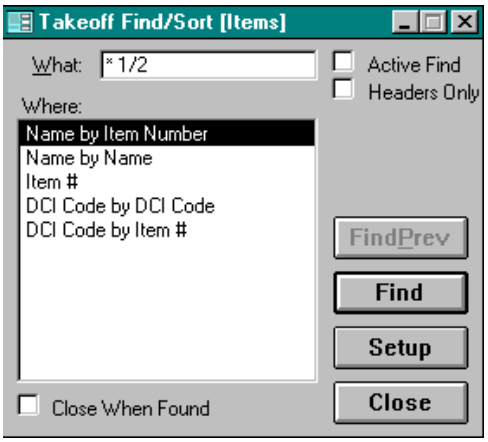

McCormick Advanced Help
File Edit Bookmark Options Help
Contents Search Back Print
Takeoff Menu List
Click on the Area you would like Help With
Takeoff Menu [Assemblies]
Branch
Feeder
Grounding
Devices
Equipment
Systems
Highway
Fixtures
Residential
TI Work
EMT
PVC
IMC
GRC
ALU
GRC/PVC
D/S, Strap
D/C, Strap
S/S, Strap
S/C, Strap
D/S, Rack
D/C, Rack
S/S, Rack
S/C, Rack
emt d/s strap
Close When Found
Setup
Close
The Takeoff Menu is one of the easiest ways to find or select Items or Assemblies for takeoff. The left-most window of the Menu lists the most general categories of parts. The next windows break down the categories into sub-categories, and sub-sub-categories. Moving from left to right just select the category and sub-categories that represent the part you're looking for. Once you have reached the category farthest to the right, highlight the final item. This will take you to the actual part or header in the "selected" takeoff list.

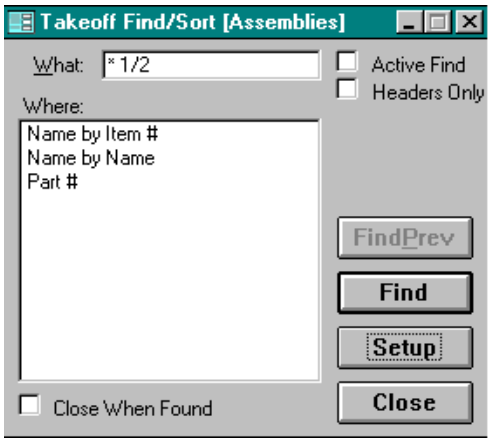
You can continue this process up to the point that a link to the actual database is necessary, at which point you will get a final text box with help information. The below example shows going to the **SETUP** button, then choosing **AddMode** from the available buttons. To get out of Help, simply hit <ESC> until out. Remember, you can print any information on the screen and make your own reference manual for those areas you use frequently.


McCormick Advanced Help
Menu Setup
Click on the Area you would like Help With
Takeoff Menu [Assemblies]
Close When Found
Setup
Close
Open Level
AddMode
Delete
This screen allows you to add or customize the categories & sub-categories that make up the "Menu" window allowing you to setup new menu lists. To change any existing entry, double click on it; this will allow you to rename or edit the entry in the box above the list. To add a new category or actual part, click on the AddMode button.


AddMode
Once you enter "AddMode" any takeoff lists you have open will now show a "Transfer" button located just above the tab bar. To transfer parts or headers into your menu system follow these steps.
Select the column where you would like to part or header to appear in the Takeoff Menu.
Highlight the part or header in the takeoff list and click on transfer.
You can keep transferring headers or parts until your menu lists are complete.

# Find/Sort

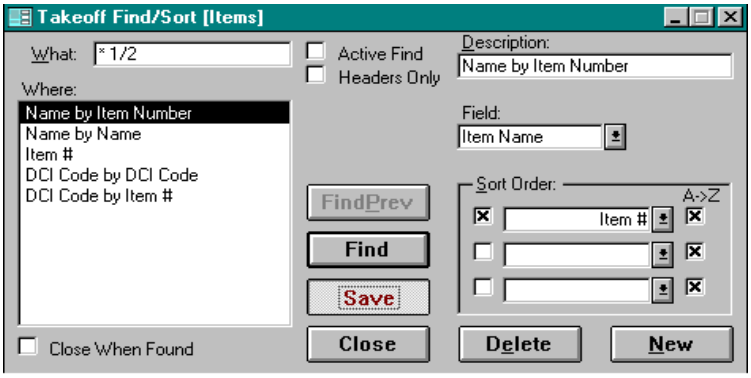



Use this screen to search the item and assembly databases that match the specified criteria. This is the quickest way to search for an unknown part. Please note that the Title Bar "Takeoff Find/Sort" lets you know which list you are going to be performing your search in (Items or Assemblies). To toggle between items or assemblies simply click on the tab of the current Takeoff window.

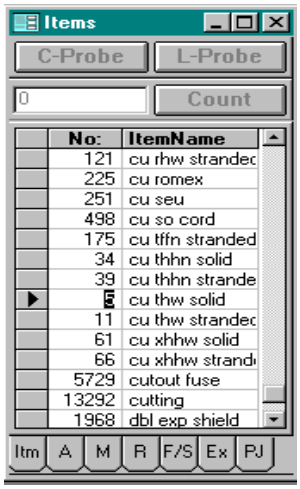
It is permissible to use a "wild card" (an asterisk) in the search. This will "replace" any characters currently before the description you are looking for, including spaces. There are also a number of different methods to match your search:

1. **Name by Item Number** – Will find matches by number in the database.
2. **Name by Name** – Will find matches alphabetically in the database.
3. **Item #** - Will go directly to the item/assembly number listed in the What field.
4. **DCI Code by DCI Code** – Will find matches to DCI Codes numerically.
5. **DCI Code by Item #** - Will find matches by item number in the database.

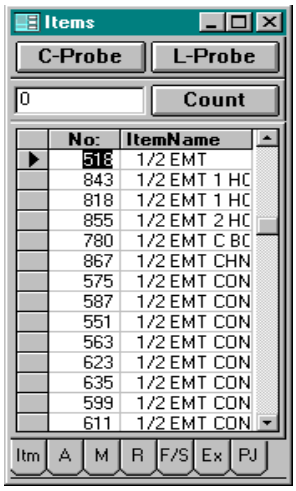



You can also "Setup" your own find/sort by choosing the SETUP button on the main window. Select NEW, add your own DESCRIPTION, a FIELD to find/sort by and SORT ORDER to find/sort by. Then click on the SAVE button and you have a new way to find/sort the database.

# Exchange

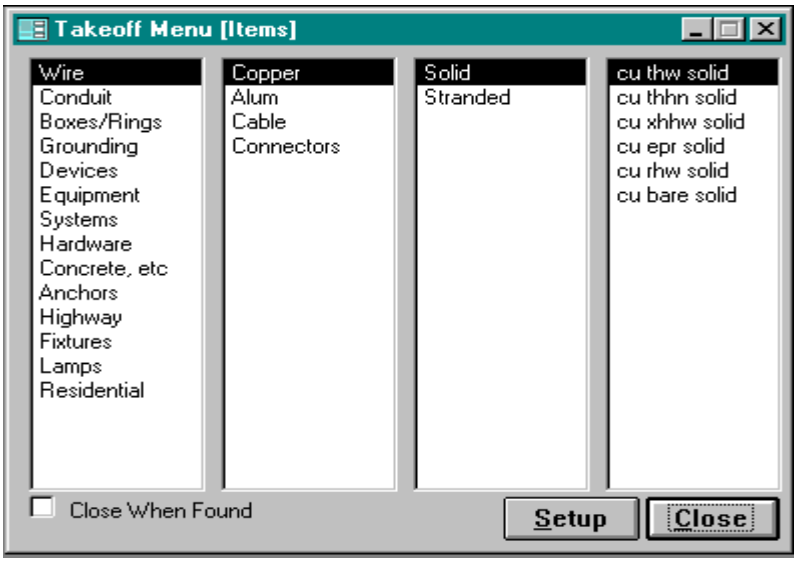



In conjunction with Find/Sort, another very useful tool is the **EXCHANGE** feature. To use this feature, you select a header (either by scrolling or through find/sort), and then click on the <EX> tab at the bottom of the window. This will bring up an alphabetical header list of all the headers in the database. If you use Find/Sort in a general manner, this will make the Exchange even easier and more desirable, since scrolling through an alphabetical list is easier than memorizing all the different combinations of headers. Once the header you want is located, simply click on the EX tab again and you will return to the "normal" database window.




The same feature can be used effectively if you wish to sort the database by a particular "size" or "dimension". Simply find the defining size in actual Items or Assemblies (as above), then select EX from the tabs below the window. This will automatically sort the entire database by the definition you selected AND put them in alphabetical/numerical order. This will make moving from EMT to GRC or PVC even easier by size in the future.

# Menu

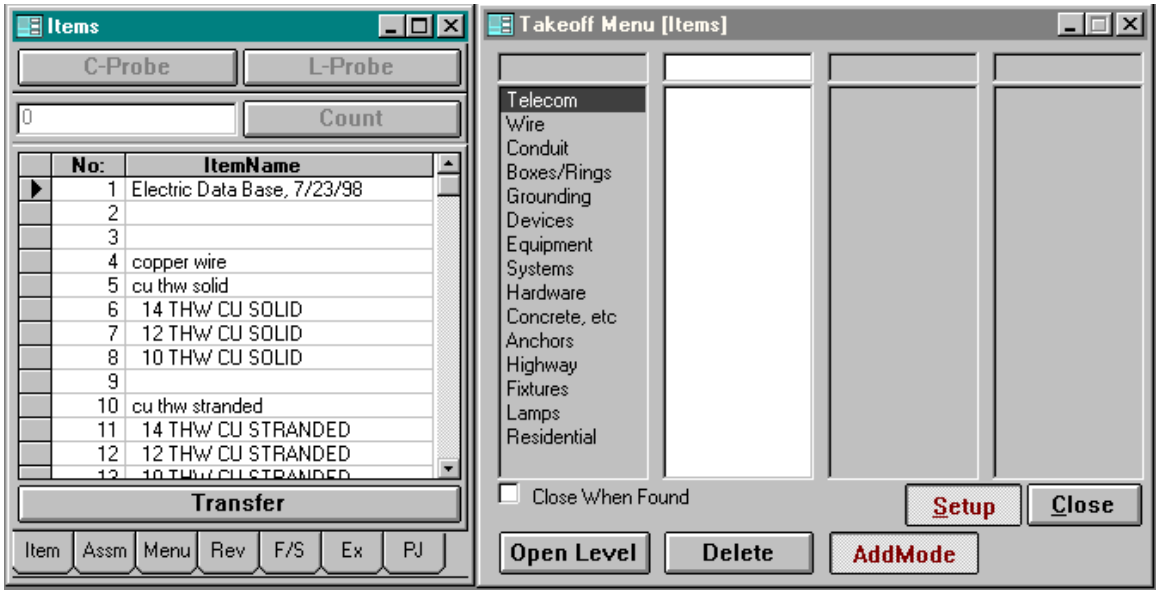



The Takeoff Menu is one of the easiest ways to find or select items or assemblies for takeoff. The left-most column of the Menu lists the most general categories. The next columns break down the categories into sub-categories, and sub-sub-categories. Moving from left to right allows you to select the category and sub-categories that represent the part you're looking for. Once you have reached the category in the farthest column to the right, highlight the final item. This will take you to the actual part or header in the "selected" takeoff list.

Using the CLOSE WHEN FOUND feature in the lower left corner of the window will close the menu automatically when the match is found in the database. This will make your overall screen easier to work with, since it will not appear so "cluttered" with windows you don't need.

> **NOTE:** The menu is "attached" to whatever window has the focus. So changing the window to moving to another window will also change the menu.
>
> **Tip:** Most users find it helpful to structure menu columns with the most general categories in the left-most column, working down to specific headers or parts in the right-most column. It's not necessary to use all the columns when setting up menus, just use as many as you need to define your categories, sub-categories, and specific headers or parts.

# Menu Setup



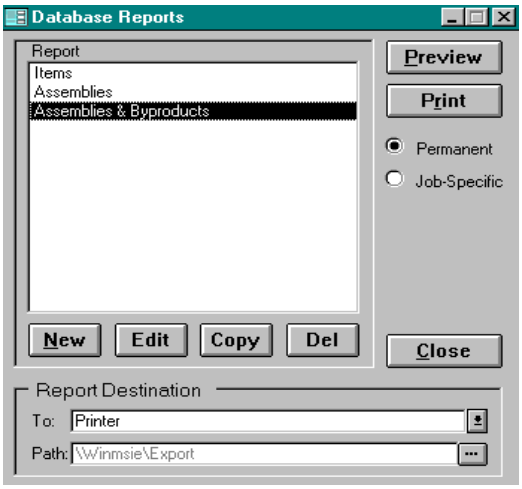

This screen allow you to add or customize the categories & sub-categories that make up the "Menu" window allowing you to setup new menu lists. To change any existing entry, double click on it; this will allow you to rename or edit the entry in the box above the list. To add a new category or actual part, click on the AddMode button.

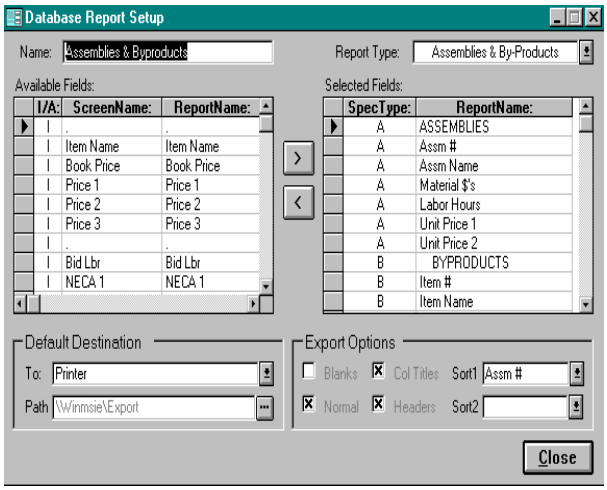
# AddMode

Once you enter "AddMode" any takeoff lists you have open will now show a "Transfer" button located just above the tab bar along the bottom of the Takeoff window. To transfer parts or headers into your menu system follow these steps.

- Select the column where you would like the part or header to appear in the Takeoff Menu.
- Highlight the part or header in the takeoff list and click on transfer.
- You can keep transferring headers or parts until your menu lists are complete.

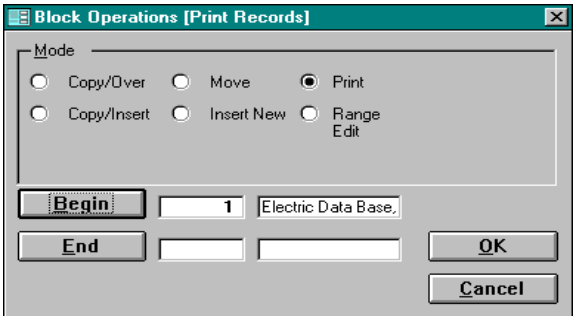
# Database Reports

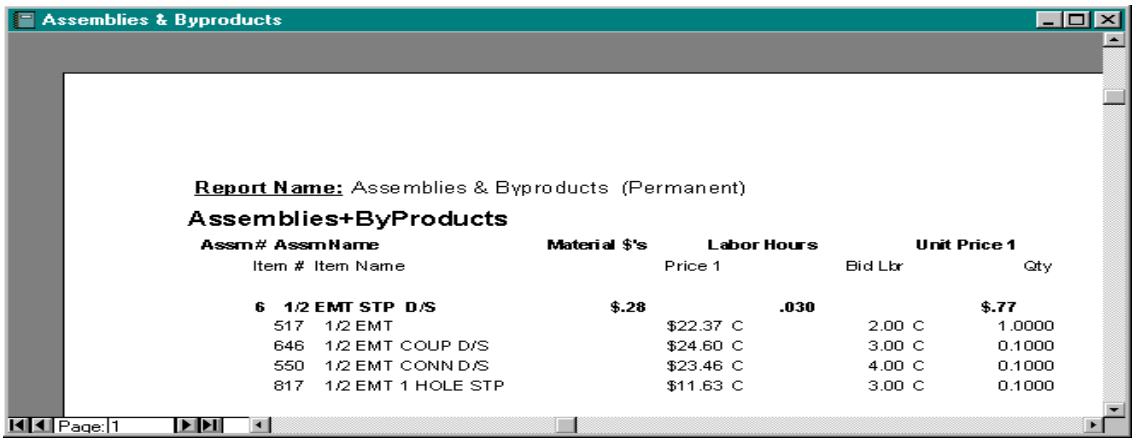



The Database Report screen operates much like the Extension Reports, however this allows you to printout your current database by selecting from the list of available reports, or by creating your own. McCormick Systems provides three pre-defined reports with which you may view, create or modify additional reports.

**Tip:** To print out your Database, you must be in a job with at least one takeoff window open. Selecting "Print" while a takeoff window is open and active will bring you to this screen. Select your range and click on OK. The report is below.



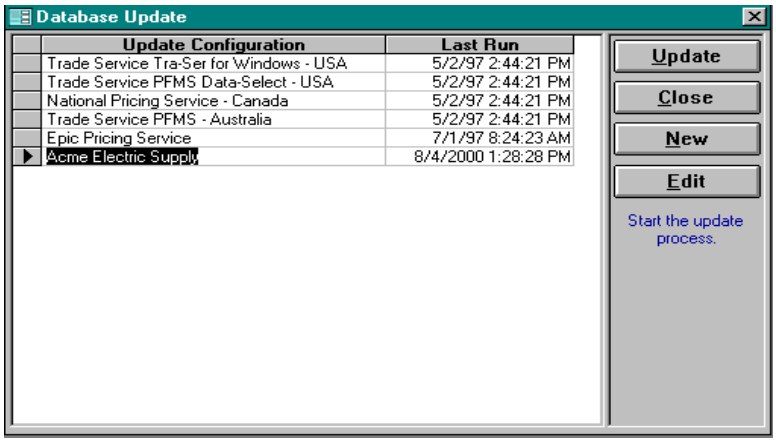


Assemblies & Byproducts
Report Name: Assemblies & Byproducts (Permanent)
Assemblies+ByProducts
Assm# AssmName Material $'s Labor Hours Unit Price 1
Item # Item Name Price 1 Bid Lbr Qty
6 1/2 EMT STP D/S $.28 .030 $.77
517 1/2 EMT $22.37 C 2.00 C 1.0000
646 1/2 EMT COUP D/S $24.60 C 3.00 C 0.1000
550 1/2 EMT CONN D/S $23.46 C 4.00 C 0.1000
817 1/2 EMT 1 HOLE STP $11.63 C 3.00 C 0.1000
Page: 1

# Notes:

# Section III

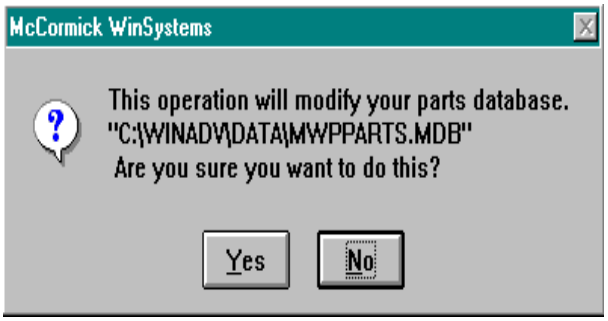
# Tools

# Price Updating

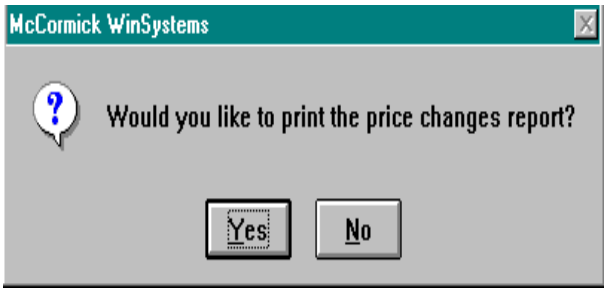


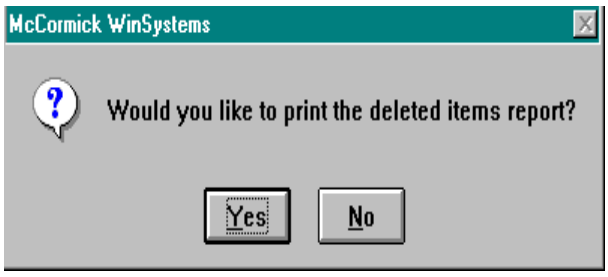

Price Updating allows you to update your current database with the latest price and labor specifications provided by third party sources (Pricing Services, Suppliers, etc.).

If you have already run a successful update all that is needed is for you to select the UPDATE option.

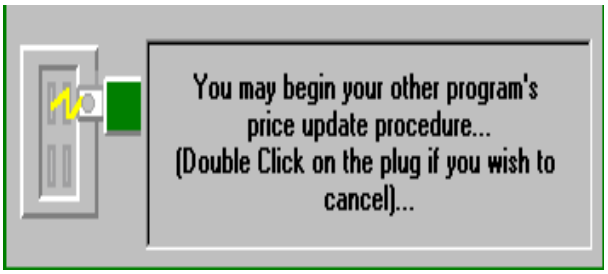



At this time you will be prompted for your "printing preferences" select the options you want and continue on.



# Price Updating (cont'd.)



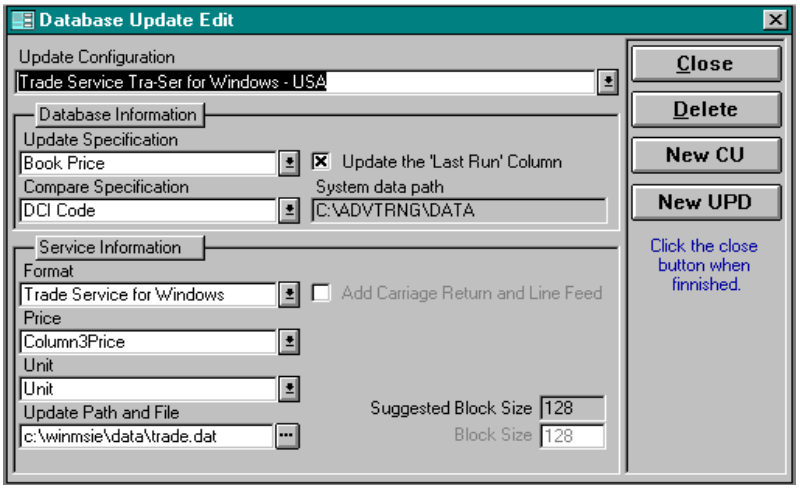

When you receive the message "Start your update application now" Minimize the McCormick WinProduct and start your third party application as you normally would. Once your application has completed its update, control will be returned to the Win Product.

Before updating the database prices, *read the bulletin* that the pricing service sends with each price update diskette. The bulletin contains information n changes in vendor number (UPC/EDP/DCI code), prices, new items, discounted items, etc.

McCormick Systems supports many different Price Updating services with more being added all the time.

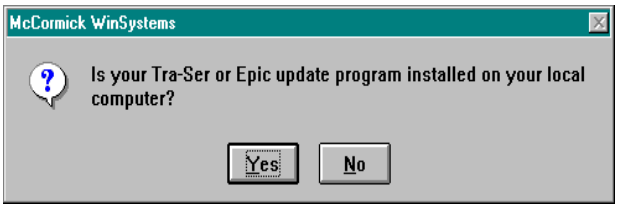
> **Tip:** If you would like a specific vendor added to the list of supported formats, contact your vendor and let them know. We will be happy to work with them directly. Just have them call us.

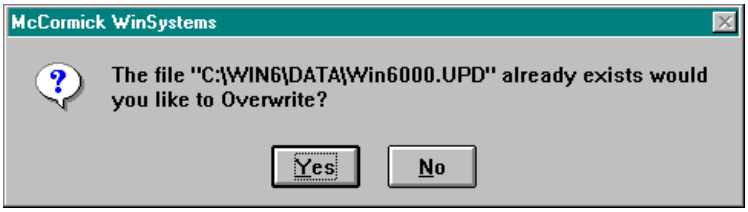
# Pricing Configuration



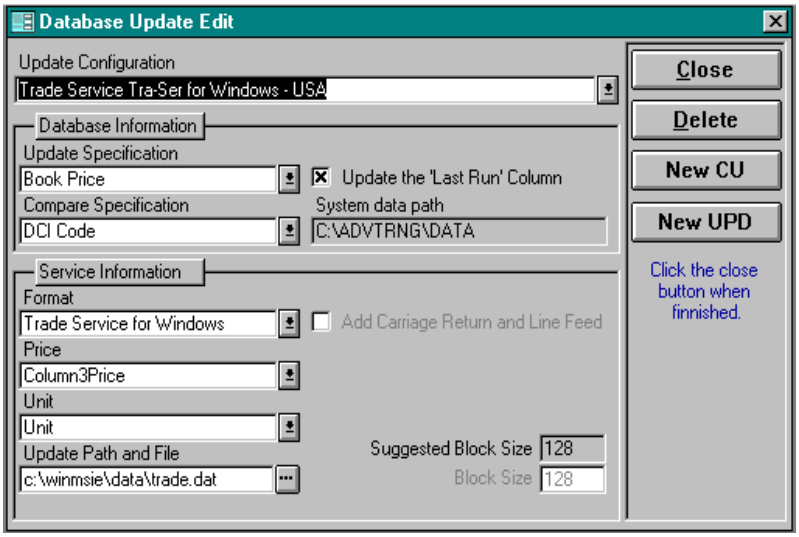

If this is the first time you are running the price updating function you will need to create a new CU file. To do this, select the format that your data is in from the previous screen and select EDIT from the buttons to the right.

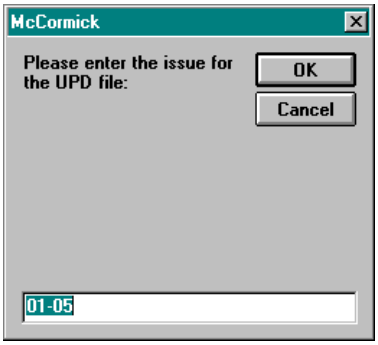
This screen allows you to define the parameters of a new or current "Update Configuration." Keep in mind that you will only need to create a new CU or UPD file *the first time you run an update for each vendor*.

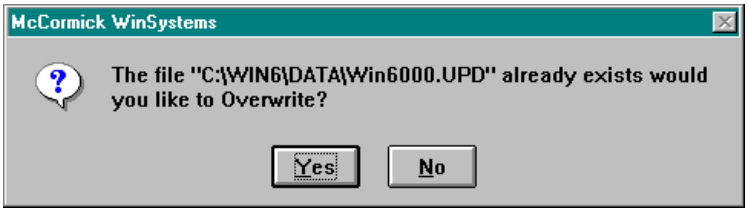




# Pricing Configuration (cont'd.)

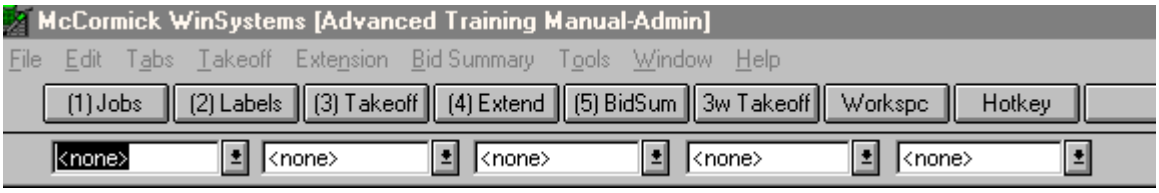




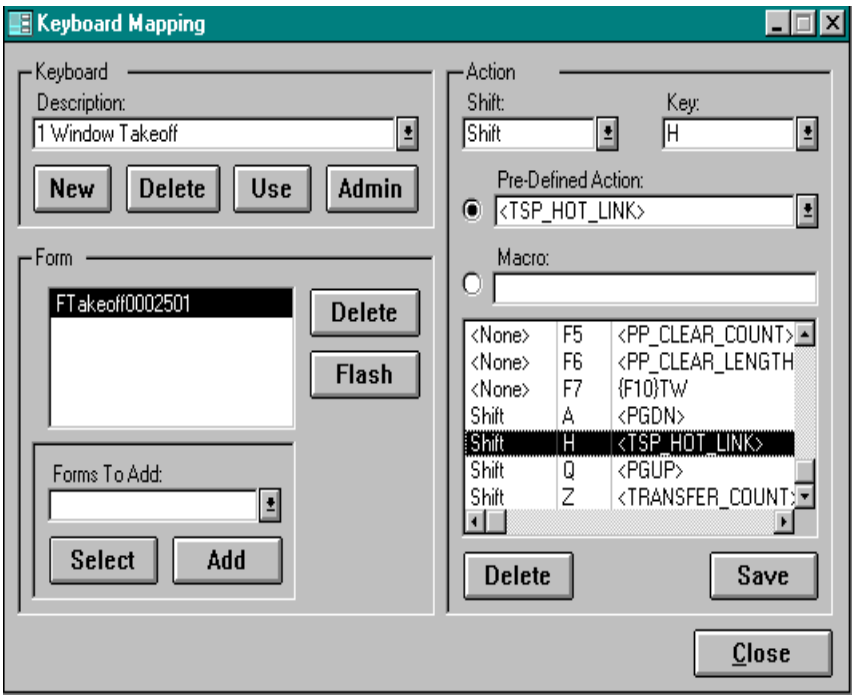




**NOTE:** Most third party vendors may be emulated by modifying the data on these screens. If you have any questions on the information needed by your vendor please contact Technical Support.

# Hot Link

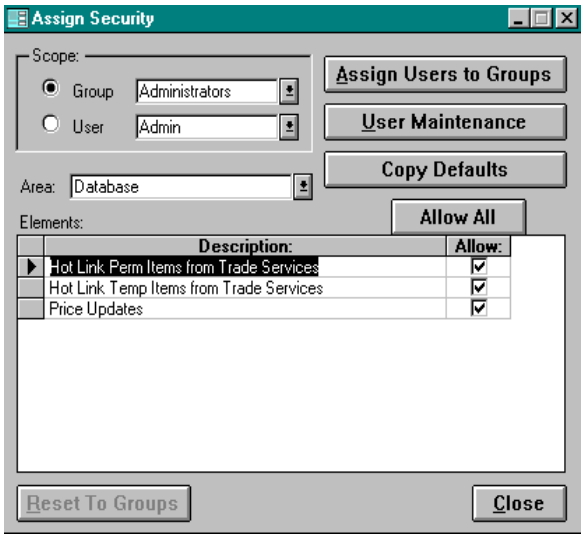



The Hot Key process allows the user to "switch" between the McCormick estimating program and the Trade Service database, "collect" data on pricing for any number of items and "import" the information back into the estimating program to be used for estimating purposes. You will have to create a button on your toolbar for this purpose. First, do a right click on a blank button and name it Hot Key. Then, bring up one (1) Item Takeoff window. Do another right click on your new Hot Key button and do a snapshot, repeat and select 1 Window Takeoff.



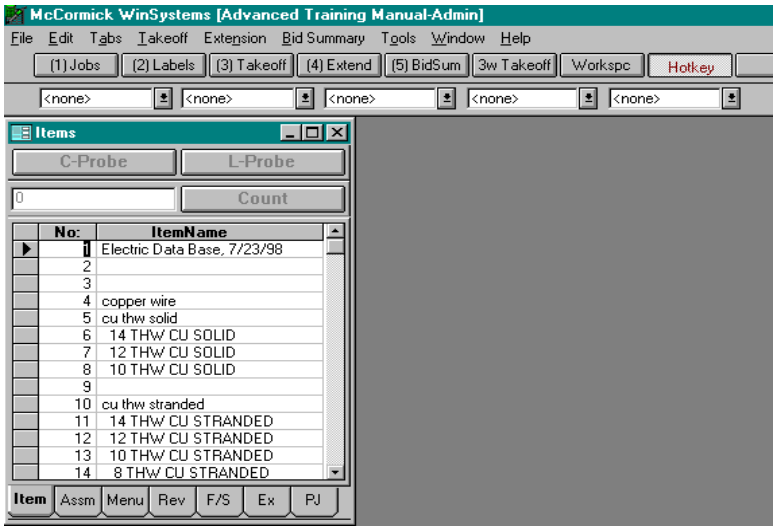

You will then select <EDIT><KEYBOARD> to open up the Keyboard Mapping window above. Make sure 1 Window Takeoff is selected in the Description field in the upper left corner of the window. Choose SHIFT in the upper right corner by using the pull-down in the Shift field, and "H" by using the pull-down in the Key field. Next, using the pull-down in the Pre-Defined Action field, select <TSP_HOT_LINK>. Finally select the SAVE button in the lower right corner, then CLOSE.

# Hot Link (cont'd.)




The final step in setting up the Hot Key is to go into <EDIT><SECURITY> and under the Group Administrator, select the AREA Database. There will be two new lines of security for Hot Link. They both need to be checked for the user to be able to perform the function.

> **NOTE:** The security is set under Administrator since this is the highest level of security. No one other than Administrators should perform this function for security reasons.

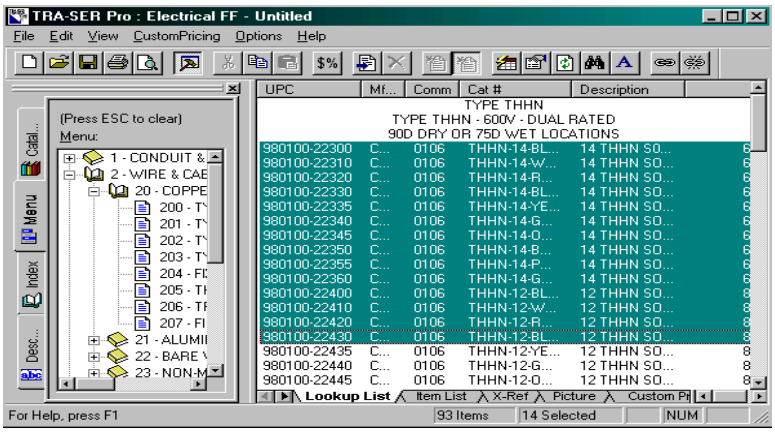



Once the Hot Key functions are all established you launch the process by clicking on the Toolbar Button Hot Key. This will bring up your single Item Takeoff window. You then hold down the SHIFT key and hit the keyboard letter "H". This will launch your Trade Service program.

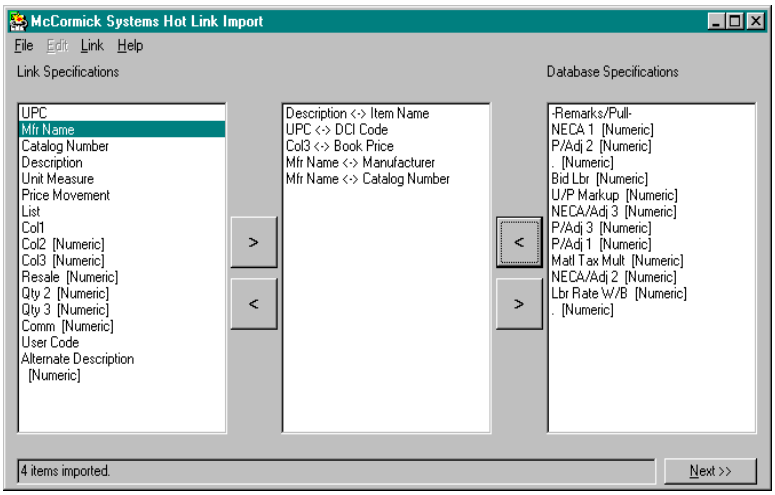
# Hot Link (cont'd.)

Trade Service DOES NOT HAVE TO BE UP AND RUNNING for our program to access it. It DOES have to be installed in such a way that our program can find it, i.e., on the C: drive for the Win6000, on the server for the Win8000.

Once Trade Service is open, you can use their menu options to locate what it is you want to transfer to the estimating program.

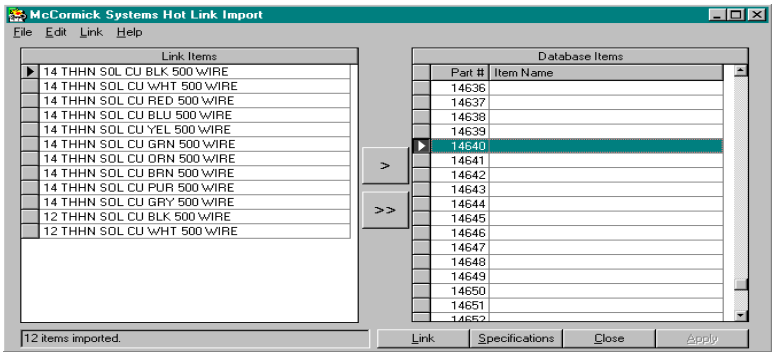

TRA-SER Pro : Electrical FF - Untitled
File Edit View CustomPricing Options Help
(Press ESC to clear)
Menu:
1 - CONDUIT &
2 - WIRE & CAE
20 - COPPE
21 - ALUMI
22 - BARE
23 - NON-M
UPC Mf... Comm Cat # Description
TYPE THHN
TYPE THHN - 600V - DUAL RATED
90D DRY OR 75D WET LOCATIONS
980100-22300 C... 0106 THHN-14-BL... 14 THHN SO... 6
980100-22310 C... 0106 THHN-14-W... 14 THHN SO... 6
980100-22320 C... 0106 THHN-14-R... 14 THHN SO... 6
980100-22330 C... 0106 THHN-14-BL... 14 THHN SO... 6
980100-22335 C... 0106 THHN-14-YE... 14 THHN SO... 6
980100-22340 C... 0106 THHN-14-G... 14 THHN SO... 6
980100-22345 C... 0106 THHN-14-O... 14 THHN SO... 6
980100-22350 C... 0106 THHN-14-B... 14 THHN SO... 6
980100-22355 C... 0106 THHN-14-P... 14 THHN SO... 6
980100-22360 C... 0106 THHN-14-G... 14 THHN SO... 6
980100-22400 C... 0106 THHN-12-BL... 12 THHN SO... 8
980100-22410 C... 0106 THHN-12-W... 12 THHN SO... 8
980100-22420 C... 0106 THHN-12-R... 12 THHN SO... 8
980100-22430 C... 0106 THHN-12-BL... 12 THHN SO... 8
980100-22435 C... 0106 THHN-12-YE... 12 THHN SO... 8
980100-22440 C... 0106 THHN-12-G... 12 THHN SO... 8
980100-22445 C... 0106 THHN-12-O... 12 THHN SO... 8
Lookup List Item List X-Ref Picture Custom Pi
For Help, press F1
93 Items
14 Selected
NUM

Find what you want (as long as it's together), click on the first item in the list, find the end of your list, hold down the shift key and then click. This will highlight your list for you. You can select individual entries in any order by using the control key and clicking. You then select the "export" icon in the upper right corner.

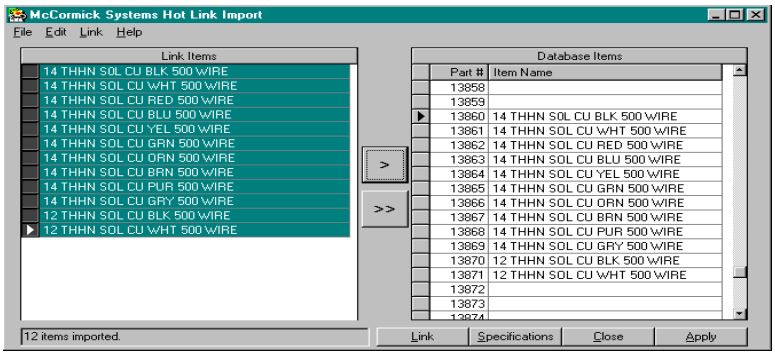



When the McCormick Systems Hot Link Import window appears, you match the Trade Service specifications on the left to the McCormick specifications on the right. Use the "in" pointing arrows, either left or right, to bring your matches together in the center window. The typical matches are illustrated above. As you make matches from the McCormick side, they will "disappear" as options. Therefore, it would be easier to work from this list.

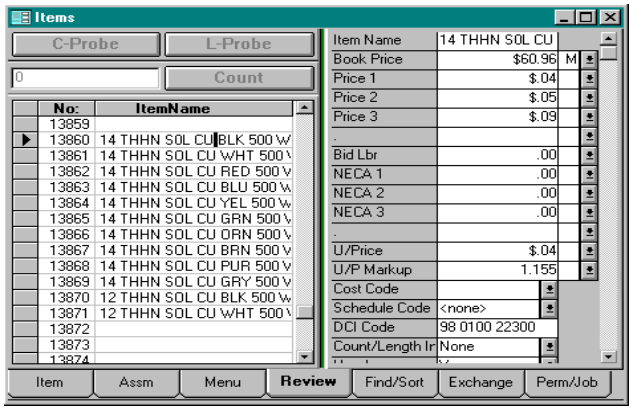
# Hot Link (cont'd.)




Once the matches are made, select NEXT in the lower right corner. This will bring up the next Import window. Now you have the list of Trade Service items on the left and a window of our database on the right. Highlight the items you want from Trade Service, using the shift key for the list, or control for specific order. Select a destination on the right and select LINK from the bottom of the window.


McCormick Systems Hot Link Import
File Edit Link Help
Link Items
14 THHN SOL CU BLK 500 WIRE
14 THHN SOL CU WHT 500 WIRE
14 THHN SOL CU RED 500 WIRE
14 THHN SOL CU BLU 500 WIRE
14 THHN SOL CU YEL 500 WIRE
14 THHN SOL CU GRN 500 WIRE
14 THHN SOL CU ORN 500 WIRE
14 THHN SOL CU BRN 500 WIRE
14 THHN SOL CU PUR 500 WIRE
14 THHN SOL CU GRY 500 WIRE
12 THHN SOL CU BLK 500 WIRE
12 THHN SOL CU WHT 500 WIRE
Database Items
Part # Item Name
13858
13859
13860 14 THHN SOL CU BLK 500 WIRE
13861 14 THHN SOL CU WHT 500 WIRE
13862 14 THHN SOL CU RED 500 WIRE
13863 14 THHN SOL CU BLU 500 WIRE
13864 14 THHN SOL CU YEL 500 WIRE
13865 14 THHN SOL CU GRN 500 WIRE
13866 14 THHN SOL CU ORN 500 WIRE
13867 14 THHN SOL CU BRN 500 WIRE
13868 14 THHN SOL CU PUR 500 WIRE
13869 14 THHN SOL CU GRY 500 WIRE
13870 12 THHN SOL CU BLK 500 WIRE
13871 12 THHN SOL CU WHT 500 WIRE
13872
13873
>
>>
12 items imported.
Link Specifications Close Apply

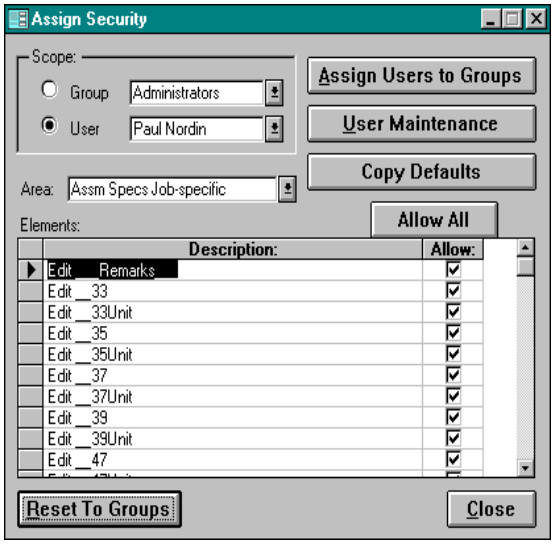
If the selections have been made properly, the list will now appear on the right side in our database. If the location on our side is correct, select APPLY to make the actual import.


Items
C-Probe
L-Probe
Count
No: ItemName
13859
13860 14 THHN SOL CU BLK 500 W
13861 14 THHN SOL CU WHT 500
13862 14 THHN SOL CU RED 500
13863 14 THHN SOL CU BLU 500
13864 14 THHN SOL CU YEL 500
13865 14 THHN SOL CU GRN 500
13866 14 THHN SOL CU ORN 500
13867 14 THHN SOL CU BRN 500
13868 14 THHN SOL CU PUR 500
13869 14 THHN SOL CU GRY 500
13870 12 THHN SOL CU BLK 500
13871 12 THHN SOL CU WHT 500
13872
13873
13874
Item Name 14 THHN SOL CU
Book Price $60.96 M
Price 1 $.04
Price 2 $.05
Price 3 $.09
Bid Lbr .00
NECA 1 .00
NECA 2 .00
NECA 3 .00
U/Price $.04
U/P Markup 1.155
Cost Code
Schedule Code <none>
DCI Code 98 0100 22300
Count/Length Ir None
Item Assm Menu Review Find/Sort Exchange Perm/Job

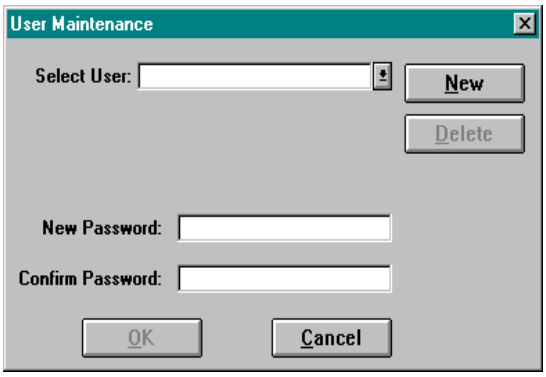
Congratulations, the Trade Service items are now part of your estimating database. Notice that the Item Name, Book Price and DCI Codes are in place. All that remains is for you to set the proper Unit for Prices 1-3, and add the Labor. This import can be for any number of items at one time.

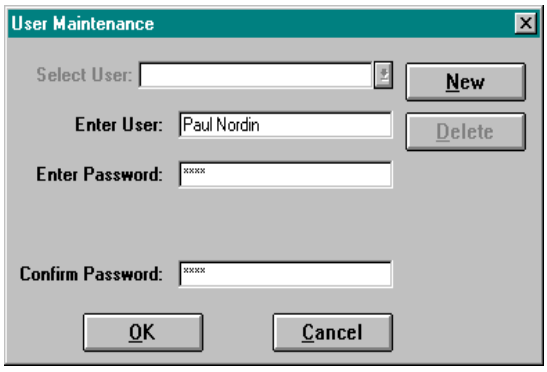
# Security

The Win Product also allow for creating individual users with specific levels of security. This function is limited to those with ADMINISTRATOR level of security in general or only those that have been assigned the authority.




The Security window allows you access to the different areas of security. It is broken into two main sections or SCOPE. The GROUP selection allows the Administrator to make general changes to an entire group at the same time. USER allows the Administrator to define the security to an individual user, regardless of the group assignment. This will allow very exact functions using the AREA and ELEMENTS within that particular area.

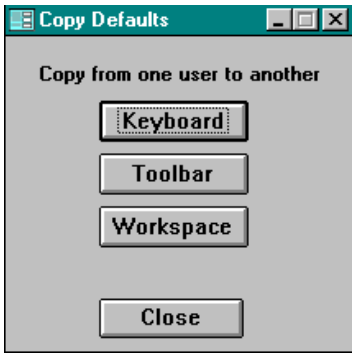


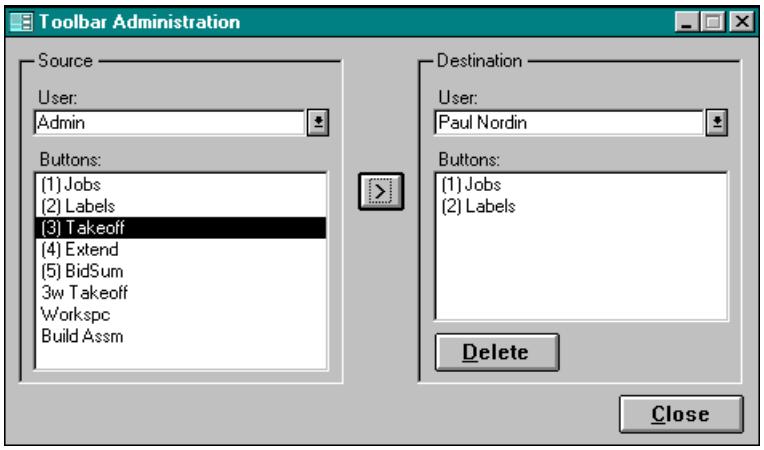




The first step or option is to go to USER MAINTENANCE. This area will allow you to do one of two operations. Either assign NEW PASSWORDS as shown on the left or create a NEW USER as shown on the right.

> **NOTE:** The User Name is used on reports and the sign-in list. Therefore "cute" nicknames such as Bubba, Buffy, and Slick are not recommended.

# Security (cont'd.)

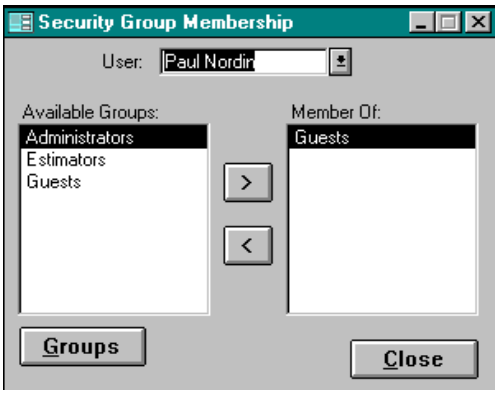



Once the New User is assigned a name and password, the next step is to assign the **DEFAULT** settings. These create the TOOLBAR buttons and the WORKSPACES the user will work with inside the program. This also provides KEYBOARD MAPPING for *utilizing the same keyboard commands that were used in the original DOS application*.

The new user is the **DESTINATION** in the above right window. Choose an existing user that has the defaults needed for the new user as the SOURCE and highlight the first default in the list. Use the right pointing arrow between the two windows to "transfer" the desired defaults to the new user. The list will automatically advance to the next choice and continue to transfer as you click on the right pointing arrow. It will also notify you if everything has been sent or a duplicate exists.

> **NOTE:** All three types of defaults MUST be created for every user, regardless of final level of security.



The next step in the procedure for creating a new user is to assign the user to a GROUP. We have three (3) levels of security already in the program. Each level of security has its own distinct capabilities as follows:

## Security (cont'd.)

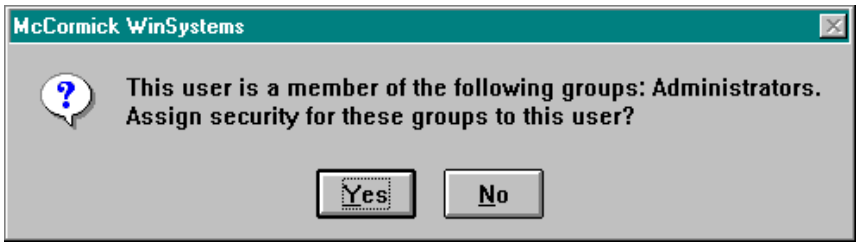
- **GUEST –** Has no "rights" to speak of. Every new user is automatically assigned this level of security. It is basically a *"look but don't touch"* function.
- **ESTIMATOR –** Has limited rights within the program. There are two very specific restrictions on an Estimator that need to be considered when assigning this level;

    1. An Estimator is NOT ALLOWED TO EDIT THE PERMANENT DATABASE! This is probably the single most important restriction on the Estimator level of security. This is critical to maintaining the pricing and labor correctly and not compromising the integrity of the database.
    2. An Estimator CANNOT open another job unless the Lead Estimator on that job has assigned them to it. An Estimator CAN start their own job and see it through to completion.

- **ADMINISTRATOR** – This is the highest level of security in the system. Has unlimited rights to any and all areas of the program, unless previously curtailed by a designated "SYSTEM ADMINISTRATOR" that has overall control of security. In those situations, the System Administrator will disable certain functions of security per group or user, and also prevent any other user, regardless of level of security, from accessing SECURITY at all.

**NOTE:** Only one level of security should be chosen for any user. Multiple selection of security will cause a conflict in certain areas of the program, resulting in the program opting for the LESSER of the securities.

It is possible to create new GROUPS of security with customized functions, but that is an advanced function and should be discussed with a qualified tech at McCormick Systems Inc. before attempting.


McCormick WinSystems
This user is a member of the following groups: Administrators.
Assign security for these groups to this user?
Yes
No

The final step in creating the new user is somewhat "hidden". On the initial Security window, select the New User in the SCOPE window under USER. Once the user is active, select the RESET TO GROUPS button in the lower left corner of the window. This button will not be active unless a specific user is chosen.

When the above message appears, verify its assignment and select YES. The user is now complete and can be accessed from the sign-in screen.

# Notes:

# Appendix

# Technical Support

**If you have any questions or you would like more information please contact us at:**

**On the Web:** www.mccormicksys.com
**Email:** msi@McCormickSys.com

**Telephone:** **Toll Free:** 1-800-444-4890
**Voice:** 1-480-831-8914
**FAX:** 1-480-820-2422 Sales/R&D
1-480-820-5243 Support

**Postal Mail:** McCormick Systems Inc.
149 W. Boston St.
Chandler, Arizona 85225

**Our Hours are:** Monday through Friday 6:00am to 5:00pm Arizona Time –
MST (Winter), PST (Summer)

If you are able to use the Internet from your current position, simply select one of the links above. Should you need to update your Internet browser, here are the sites of the two most popular browser's.

**Microsoft home page:** http://www.microsoft.com/ie * recommended

**Netscape home page:** http://home.netscape.com/

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